COLLEAGUE SELF-SERVICE 2.26

The Colleague Self-Service 2.26 software was released on December 19, 2019. For specific details on the changes included in this installer as well as important implementation details, see the Release Summary for Colleague Self-Service 2.26 (Release 020606) Installer.

Colleague Self-Service communicates with Colleague using the Colleague Web API, which must be set up prior to setting up Colleague Self-Service. It is essential to review the Release Summary for each of the releases required by Colleague Self Service 2.26:

- Envision Update in Support of Colleague Web API 1.26 (Release 020996) Repository Update
- Colleague Update in Support of Colleague Web API 1.26 (Release 020612) Repository Update
- Colleague Web API 1.26 (Release 020830) Installer

Note: You can find all referenced documentation in the Colleague Self-Service 2.26 Documentation content pack in the Ellucian Customer Center.

Tip: You can download all the documentation from the content pack to a local directory and use Edit>Advanced Search feature in Adobe Reader to search all the documentation at once.

Installers are available through SA Valet version 2.8.0 or later. Download using the Download Installer File icon on the View Installer Release Packages form associated with the listed release packages. For more information, see the Viewing and Downloading Installer Releases section of the Updating Colleague Software (Release 18) manual.

Installation Overview

- Download and review the *Colleague Self-Service Installation and Administration 2.26* manual.
- For hardware requirements, configuration, and deployment planning guidance, refer to the *Colleague Self-Service Hardware and Software Guide.*
- Download and install the Colleague Web API 1.26 website and the required Envision and Colleague updates as listed above. Detailed installation instructions can be found in the *Starting Document for Colleague Web API 1.26*.
- After Colleague Web API 1.26 has been installed and configured, download and install the Colleague Self-Service 2.26 website using installer IN020606*7. The installer is listed under project Colleague Self-Service.

  Note: If you have installed prior versions of Colleague Self Service and Colleague Web API websites, you can upgrade those sites to Colleague Self-Service 2.26 and Colleague Web API 1.26.

About Colleague Self-Service

Colleague Self-Service 2.26 provides a wide variety of functionality delivered in a menu structure outlined below. Each page can be selectively activated for users according to the needs of your institution. Colleague Self-Service setup information for many areas can be found in the *Colleague Self-Service Installation and Administration 2.26* manual and *Colleague Self-Service Base Setup User Guide 2.26* manual. Supplemental setup guides are also provided for certain areas as referenced below.

Financial Information

- **Student Finance**: Account Summary, Make a Payment, Account Activity, My Bookstore Available Funds, Pay for Registration, Registration Activity. Review the *Student Finance User Guide*. To process payments with Student Finance, review the *Colleague eCommerce Starting Document*. To set up the Pay for Registration workflow, review the *Using Immediate Payment Control* manual.
- **Financial Aid (Optional Module)**: Required Documents, My Awards, Report/View Outside Awards, Request a New Loan, Offer (Award) Letter, College Financing Plan, Correspondence Option, Satisfactory Academic Progress. To set up Financial Aid Self-Service, review the *Setting Up Financial Aid Self-Service* manual.
- **Tax Information**
- **Banking Information**

Employment

- **Employee:** Tax Information, Banking Information, Time Entry, Time Approval, Time History, Earnings Statements, Faculty Contracts, Employee Proxy, Leave, Position History, Stipend History, Total Compensation Statement. To set up Time Entry and Time Approval, review the *Time and Leave Processing* manual. For Employee proxy, review the *Self-Service Proxy User Guide.*

Academics

- **Student Planning (Optional Module):** Planning Overview, My Progress, Plan & Schedule, Quick Registration and Course Catalog. Review the *Setting Up Student Planning* manual
- **Register for Classes (Baseline Registration):** Quick Registration, Schedule, and Petitions and Waivers.
- **Grades**
- **Graduation Overview**
- **Enrollment Verifications**
- **Transcript Requests**
- **Nonacademic Attendance**
- **Course Catalog**
- **Academic Attendance**
- **Test Summary**
- **Unofficial Transcript**

Daily Work

- **Advising (Optional Module: Student Planning):** Review the *Setting Up Student Planning* manual.
- **Faculty:** Grading, Petition, Consent, Requisite Waivers, Roster, and Textbooks.
- **Financial Management:** Budget to Actuals, Projects Accounting, Finance Query, Budget

Development, Procurement

- **Student Finance Admin:** Student Finance Administrator Workflow. Review the *Student Finance User Guide*
- **Emergency Info Access**
- **Organizational Structure**
- **Financial Aid Counseling (Optional Module: Financial Aid):** Financial Aid Administrator Workflow. Review the *Setting Up Financial Aid Self-Service* manual.
- **Earnings Statement (Admin)**
- **Tax Information (Admin)**
- **Time History (Admin)**
- **Total Compensation Statement (Admin)**

Vendor Information

- **Banking Information**
- **Tax Information**

User Options

- **User Profile**
- **Emergency Information**
- **View/Add Proxy Access:** Proxy access is available for Financial Aid, Student Finance, Notifications, Student Grades, Tax Information and Time Approvals. Review the *Self-Service Proxy User Guide (*formerly *Person Proxy User Guide)*.
- **Required Documents**
- **Required Agreements**
- **Change Password**
- **Change Proxy User**
- **Site Administration**
- **Account Preferences**

Note: Refer to the *Customizing Colleague Self-Service* manual and the *Customizing Colleague Web API* manual for detailed information regarding how to customize Colleague Self-Service.