

Jan2024 - Full Patch Notes

Business Office

036761 Colleague Finance Quality Release - Q4, 2023

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU036761-1805*6

Problem/Issue

The following defects were resolved with this release:

PD0006731 - Colleague Finance - Final Approved Email Notification for Document Doesn't Contain Approval or Date Information

PD0002913 - BREG CSV shows Vendors even when Vendor IDs are excluded in filter.

PD0009700 - GLBS detail report not displaying transactions when using non US dates

49907.85 - CFAR: Reporting on the current open fiscal year

CR-000184937 - Colleague-Ethos API: Procurement Documents Using Overbudget Frozen Accounts Post Erroneously Without Error

PD0010460 - PATB: PAGW.DESCRPTION field size should be increased to 100 characters to match the source files

Client Impact

Several defects were resolved with this release, please see the description, problem, and resolution sections for more information.

Resolution

The following defects were resolved with this release:

PD0006731 – The subroutine S.SEND.WEB.DOC.APPROVED.EMAIL was updated so that the email notification after all approvers have been met now correctly contains the Approval and Date information for the users that provided their approval.

PD0002913 – The Blanket PO Register (BREG) was modified to exclude vendors as specified in the Exclude Vendor ID field.

PD0009700 – Modified Budget Status Report (GLBS) to respect non US date formats and display transaction details within the date range as specified.

49907.85 – The Cash Flow Analysis Report (CFAR) was modified to use the fiscal year entered correctly instead of the only using the current open fiscal year.

CR-000184937 – The Ethos APIs for requisitions, purchase orders, blanket purchase orders, and accounts payable invoices have been updated to correctly disallow the use of a frozen GL account and will display an error as expected.

PD0010460 – The field size of the PAGW.DESCRPTION field in the PA.GLA.WORK file has been increased so that the Projects Trial Balance (PATB) report will now correctly report on project postings with longer descriptions longer than 80 characters.

037028 Colleague AR/CR Enhancements

Description:

October 2023 - The following release is available to clients to be installed with the Envision Release System:

SU037028-1805*5 - Colleague AR/CR Performance 2023

Problem/Issue:

Change Requests resolved by this update:

CR-000182955 ARTI past due incorrect for past due payment plans

PD0008860 Colleague AR - Student Finance Anticipated FA performance issue

PD0009090 SaaS PostgreSQL Payment Plan Performance

Client Impact

AR Defaults and Parameters (ARDE) A new Update Reg Cred Hrs for Ant FA Calc parameter was added to AR Defaults and Parameters (ARDE) to indicate if the PERSON.ST FA credit hours should be updated prior to calculating Anticipated FA. The Update Reg Cred Hrs for Ant FA Calc parameter needs to be set to Yes to update the PERSON.ST FA credits hours once instead of calculating the credit hours every time a rule or limitation subroutine is processed. Student Finance Parameters (STFP) A new Update Reg Cred Hrs for Ant FA Calc parameter was added to Student Finance Parameters (STFP) to indicate if the PERSON.ST FA credit hours should be updated prior to calculating Anticipated FA. Note: The Update Reg Cred Hrs for Ant FA Calc parameter needs to be set to Yes to update the PERSON.ST FA credits hours once instead of calculating the credit hours for each rule or limitation subroutine processed. In addition, the Enable D7 Calculation now has three options: Yes, No, and Include all D7 awards. The Include all D7 awards functionality will be delivered in December of 2023. Currently, only the Yes/No options are available.

Resolution

CR-000182955 The past due amount on the AR Term Inquiry (ARTI) was sometimes incorrect for past due payment plans. The past due amount on ARTI is now accurate.

PD0008860 The Colleague Update in Support of Colleague Web API 1.39 and Self-Service 2.39 (SU035370) updated the subroutine that calculates anticipated FA to automatically update the PERSON.ST FA credit hours used in award rules and limitation subroutines before calculating Anticipated FA. This introduced a performance concern for customers who did not use award rules and limitation subroutines.

A new Update Reg Cred Hrs for Ant FA Calc parameter was added to Student Finance Parameters (STFP) and AR Defaults and Parameters (ARDE) to indicate if the PERSON.ST FA credit hours should be updated prior to calculating Anticipated FA. The Update Reg Cred Hrs for Ant FA Calc parameter needs to be set to Yes to update the PERSON.ST FA credits hours once instead of calculating the credit hours every time a rule or limitation subroutine is processed.

PD0009090 SaaS PostgreSQL customers could have a performance issue with students on a Payment Plan if the student has an excessive number of invoices and invoice items. Record caching and other enhancements were added to several subroutine to increase the performance for students with or without a pay plan.

037298 Colleague Year-End Regulatory 2023 Part 2

Description:

IMPORTANT NOTE: Release 037298 includes updates to the calculations for the Enhanced Canadian Pension Plan changes effective for any check date on or after January 1, 2024; therefore, Canadian customers must install Release 037298 in a production environment prior to the first payroll with a January 2024 check date.

This release, coupled with the listed Colleague Web API releases above, allows clients to access Canadian T4A forms in Colleague Self Service, as well as improvements to populating Box 45 on the T4, and Box 15 on the T4A.

Also, this release contains updates to the calculation of the Enhanced CPP tax to comply with detailed scenarios released by the CRA.

Problem/Issue

Issues - Canadian 2023 Tax Form Processing:

The 2023 T4A form was published by the CRA. Colleague released updates to allow for processing of the T4A in Colleague UI, but not in Colleague Self Service.

The CRA announced that employees who earn no income or taxable benefits for a tax year but were offered dental benefits must still receive a T4 (Employer Offered Dental Benefits – Box 45 – had a value of 2-5). The Colleague T4GN process did not create T4s for employees in this scenario. This also applies to the T4AR, T4FM, and T4MM processes.

The T4GN process produces error messages for every active employee who does not receive a T4 for a given tax year. However, some clients prefer that T4GN would not produce these errors.

Clients requested that the T4GN process output report indicate the value of Box 45, along with a message revealing the

rule ID of the rule that passed from the T4DP form to derive this value, or if the value came due to a default on the T4DP form.

The TAMM process did not include data for Box 15 when the user submits an initial T4A, makes a correction, and attempts to submit an amended T4A.

Issues - Canadian Pension Plan

PD0011207 Colleague Human Resources – Canadian Pension Plan Enhanced Amount is not reducing the Taxable Amount for Federal and Provincial taxes.

PD0011208 Colleague Human Resources – Batch Assign Enhanced CPP Tax Code (BAEC) fails when run wide open; incorrect name and error message included on report.

PD0011210 Colleague Human Resources – CDD.SUBR.HOOKS record is missing for S.PR.TAX.ECPP.

Client Impact

Canadian customers can now accurately produce the tax forms in Colleague and process calculations related to the Canadian Pension Plan.

Implementation Instructions

Review your provincial subroutine to determine if it must be updated to comply with the new CPP regulations.

Technical Implementation

Modified Subroutines/Inserts:

If you have customized any of the following subroutines, you need to take a careful look at your customizations in light of these changes:

S.PR.CALC.TAXES

S.T4.CHECK.TXTBL.LIMIT

Modified Menus:

CNS

Modified Forms/Processes:

2023-T4A-ST.pdf

BAEC - Batch Assign Enhanced CPP Tax Code (PRF007, PRR082)

T4GN – T4 Generation Process (HRU246, HRB246, I_SUBR.HRB246)

T4FM – T4 Slip Production (HRR245, I_SUBR.HRR245)

T4MM – T4 Export (HRR249)

TAMM – T4A Media Production (APR073, APB047)

Resolution

The 2023 T4A can now be produced in Colleague Self Service.

The T4GN and T4AR processes now create T4 work file records for active employees who have no income or taxable benefits but do have a value of 2 through 5 in the Employer Offered Dental Benefits field (Box 45). The T4FM process prints a T4 for these individuals. The T4MM process includes these individuals in the media file.

The T4GN form now contains a parameter to indicate whether or not the user would like to include an error message for every active employee that does not receive a T4.

The T4GN output report now includes the value of Box 45, along with a message identifying the Rule ID of the rule that passed, or if the default value was used.

The TAMM process now includes data for Box 15 on records that had been previously submitted and are being amended.

Resolution: Canadian Pension Plan

PD0011207 Amounts withheld for the Canadian Pension Plan Enhanced tax were not reducing the year-to-date taxable amounts for Federal and Provincial taxes.

Federal and Provincial year-to-date taxable amounts are now reduced by the amount of any CPP Enhanced amounts withheld.

PD0011208 When Batch Assign Enhanced CPP Tax Code (BAEC) was run with no Select List or Employee indicated, it would not complete. Further, when multiple employees with the same last name were reported, sometimes the incorrect (first) name would be included on the report.

BAEC now completes when run with no Select List or Employee indicated. Employee names are now displayed correctly.

PD0011210 S.PR.TAX.ECPP did not show up in the list of subroutines on EEDE or CSHE because the CDD.SUBR.HOOKS record was missing.

The CDD.SUBR.HOOKS record for S.PR.TAX.ECPP has been added. SaaS customers may now specify S.PR.TAX.ECPP ON THE Employee Deduction Table (EEDE) during tax code setup and may register their custom via CSHE.

Financial Aid

035237 2024-2025 INAS/PROFILE Update

Description:

September 28, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU035237-1805*16

The following software update will soon be released and available to clients to be installed with the Envision Release System: SU035237

This is the main release for the 2024/2025 INAS/PROFILE updates for Colleague Financial Aid. Once this software update is installed clients can begin importing and processing their 2024/2025 PROFILE/NCP application data.

This software update provides regulatory enhancements for processing information for the 2024/2025 processing year.

This software update provides the following:

- The 2024/2025 PROFILE forms and regulatory updates to add new and remove elements by College Board for the new processing year.
- The Department of Ed Import (DOEI) import process was updated to now import the consolidated PROFILE and NCP files (Domestic, Canadian, International) for the new processing year.

This software update resolves the following change requests:

PD0010142 PFWS fails to run for clients who do not use the HR submodule

Problem/Issue

Regulatory and yearly updates were required in Colleague to process XML PROFILE/NCP application information for the 2024/2025 processing year. Also, one client reported issues was addressed with this software update. See the Description section for more information about the issue resolved with this software update.

Client Impact

This software update provides regulatory enhancements for processing XML PROFILE application information for the 2024/2025 processing year. This software update also resolves one change request. See the Description section for a list of the regulatory changes and resolved change request.

Resolution

Clients can begin processing their PROFILE data for the 2024/2025 processing year.

035238 2024-2025 ISIR Processing Update

Description:

December 21, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU035238-1805*50

This is the initial release for the 2024/2025 ISIR update for Colleague Financial Aid. After this software update is installed, clients can begin updating rules and importing 2024/2025 ISIRs application data once ISIR files are available from the FAFSA Processing System (FPS)

NOTE: As of this release, FPS has not provided the 2024-25 test ISIRs and is not planning on making the files available until sometime in January 2024. Once Ellucian receives those test ISIR records, development will be testing the 2024-25 ISIR imports and SAI/PELL calculations. We felt it was important to release this software update to allow clients to continue to update their rules and setting up their systems for the new processing year.

This software update provides the following regulatory enhancements for processing ISIR information for the 2024/2025 processing year:

- All the 2024-2025 FAFSA file and forms updates to add, update, or change new elements that resulted for the new processing year.

o Note: The verification forms have not been updated to support the 2024/2025 processing year.

- The ISIR Import (ISIM) process can now import the 2024-2025 FAFSA data.

- Created new ISIR comment and reject codes for the 2024/2025 processing year.

o Note: Several rejects were published late and are not included in this release.

- Updated the Correction Application Export (CAPX) process to send correction data to FPS for the new processing year.

- The Department of Ed Import (DOEI) import process was updated to import the 2024/2025 ISIR data from the FTI-SAIG mailbox.

- Updated the FA JSON Parameters (INJP) form to add the Ethos service key used to call the SAI/PELL calculations.

See the Implementation Instructions for further information.

- Updated the Pell and Direct Loan packaging subroutines to support 2024/2025 requirements.

This software update resolves the following change requests:

PD0011072 Profile students can have a negative FC resulting in an increased Need amount

PD0011124 2024-25 Profile response dependencies (EFM)

PD0006022 Colleague FA: ISIM wipes out the GENDER in PERSON

Problem/Issue

Initial regulatory and yearly updates were required in Colleague to process ISIR application information for the 2024/2025 processing year.

Also, several clients reported issues were addressed with this software update. See the Description section for more information about the issues resolved with this software update.

Client Impact

Clients can begin processing the ISIR data for the 2024/2025 processing year once ISIRs are available.

The following manuals are being updated with this release:

- INAS PROFILE Processing
- COD Interface
- ISIR Processing
- Colleague Financial Aid: Initial and Yearly Setup
- Need Analysis
- Awarding and Aid Distribution
- Grants Processing for Pell, TEACH, and IASG

IMPLEMENTATION INSTRUCTION:

1. Ellucian suggests that institutions NOT enter their FTI-SAIG login and password on the CODP form until FPS provides the 2024-2025 ISIR files in late January. Institutions will be required to install TDClient 3.5.0 prior to retrieving the 2024-2025 ISIR files in late January.

2. Starting with the 2024/2025 processing year the SAI and Pell calculations will use an SAI and Pell Service that runs in the cloud. Clients will need to create an Application in Ethos Integration to generate an API key for the service then populate the following information on FA JSON Parameters (INJP) form BEFORE beginning processing for the 2024/2025 award year:

SAI/Pell JSON API Key

Colleague uses Ellucian Ethos Integration to interface with SAI and Pell calculation service. Ellucian has built a service in the Ellucian cloud that takes application data, sends it to SAI and Pell service, and receives back calculation results that are then loaded into Colleague.

To gain access to the Ellucian cloud, you must build an Application in your Ethos Integration tenant's Production environment that needs access to the SAI/Pell service. Because the application data is passed through in a JSON record written by each product and not pushed or pulled through Ethos, you must create an Application. The newly created Application does not require any resources, subscriptions, or other services. You create this Application to generate an API Key so that Colleague can access the Ellucian cloud to use the interface.

If you are not familiar with Ethos Integration concepts, learn the fundamentals of Tenants, environments, and applications in About Ellucian Ethos Integration.

Procedure

1. Verify that you have an Ethos Integration tenant in your Customer Center under Tools>Ethos>Integration
2. If you do not have tenant, open a case with Customer Support and request a tenant using the following information:

Product Line: Customer Success

Product Name: Customer Center

Product Module: Tenant Access

3. When you have your tenant established, log in to Ethos Integration.
4. a. Select Tools > Ethos > Integration.
5. Select your Ethos Integration Production environment
6. Within your tenant's Production environment, select the Applications option tab at the top left
7. From the Applications screen, click Manually to create a new application.
8. Clear all optional fields on the Add Application pop-up menu and click Continue.
9. Define the Application's Name and Description.

For example, we recommend:

Name: Ellucian SAIPELL Service

Description: Application for access to Ellucian SAI/PELL calculation service.

10. Click Next to add the Application.

Ethos Integration confirms the addition of the Application.

- o If prompted to Add Subscriptions, click Skip as subscriptions are not necessary for the SAI/PELL service.

11. Click the View Application option to obtain the API Key.
The API Keys tab lists available keys for the Application.
12. Click the eye icon to display the generated API key.
13. Copy the API Key's value.
14. Open a Colleague UI session and enter the FA JSON Parameters (INJP) form.
15. Paste the API Key into the FA JSON API Key field on the INJP form.
16. Save your work on INJP form.

Once the INJP form fields have been entered, institutions can begin processing their SAI/PELL calculations for the 2024-2025 processing year after ISIRs are imported.

NEW FORMS

FA JSON Parameters (INJP)
FA Calc Result Details (FRDT)
SAI Intermediate Values (SAIV)
FPS General Information (FPSI)

MODIFIED FORMS:

Needs Analysis Summary (NASU) Student FA Demographic Data (SD24)
Parent Benefit Programs (PB24)
Student FA Interests (SI24)
Student FA Financial Data (SF24)
Additional Stu Financial Info (AS24)
Student Spouse Demographic (SPD24)
Parent FA Demographic Info (PI24)
Parent FA Financial Information (PF24)
Other Parent Financial Information (OPF24)
Additional Par Financial Info (AP24)
Dependency Status Questions (DS24)
Additional Parent Demographic (APD24)
COD Parameter Definition (CODP)
Match Flag Information (MFLG)
FAFSA Comment Codes (FFCC)
Application Workflow Choices (NAWC)

Resolution

This software update provides regulatory enhancements for processing of ISIR data for the 2024/2025 processing year.

This software update also resolves several change requests submitted by clients. See the Description section for a list of the regulatory changes and resolved change requests.

037598 Trimdata FA~Link 2023 Q4 Update

Description:

December 14, 2023 The following software update is available to clients to be installed with the Envision Release System:

SU037598-1805*3 – FA~Link 2023 Q4 Update

This update resolves change requests and makes enhancements to FA~Link that resolve issues with reporting to Excel and other small bug fixes.

Human Resources

037007 Colleague 2024 Tax Tables Part 1

Description:

This software update includes the first set of 2024 state tax tables, a Social Security wage base increase, and the draft version of the Federal withholding tables that were published on November 28th, 2023. Also, the Georgia tax tables needed to be updated to include a Head Of Household and Married Filing Separate filing statuses.

Problem/Issue

The following states published their 2024 tax tables: Arkansas, California, Colorado, Connecticut, Kentucky, Maine, Missouri, Montana, Nebraska, New Mexico, Ohio, Oklahoma, South Carolina.

The Georgia tax tables were updated to include Head Of Household and Married Filing Separate filing statuses. The Married filing status was removed, leaving three filing statuses in its place – Married Filing Jointly (one spouse works), Married Filing Jointly (both spouses work), and Married Filing Separately. Note – The 2024 updates to Georgia's state tax tables are not part of this release. They will be included in a January 18th release – SU037335.

Social Security increased their wage base to \$168,600, and increased the maximum tax limit to \$10,453.20.

A draft version of the 2024 Federal withholding tables were also released. No further changes are expected at this time.

North Dakota made a correction to its supplemental withholding rate from 1.84% to 1.50%.

Client Impact

Clients can process 2024 state and Federal tax calculations, along with accurate Georgia tax calculations.

Implementation Instructions

Tax table updates Ellucian delivers are not applied to your Colleague tax tables until the Import Tax Tables (IMTT) process is run. If you maintain the tax tables manually rather than through the IMTT process, install this software update but do not run the IMTT process. This will leave your tax tables unaffected.

Also, Montana clients should remove their Withholding Exemptions after running IMTT.

Resolution

The listed state tables, the Social Security tax calculations, and the Federal tables were updated for 2024.

Special Note: After running IMTT, Montana clients should delete the Withholding Exemptions amount.

The Georgia tax tables have been updated to now have the following filing statuses, so clients should set up their tax codes accordingly:

Single

Married Filing Jointly (one spouse works)

Married Filing Jointly (both spouses work)

Married Filing Separately

Head Of Household

Note – The 2024 updates to Georgia's state tax tables are not part of this release. They will be included in a January 18th release – SU037335.

037156 2023-Colleague HR Quality Release #4

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037156-1805*21

The new Faculty Contract Recalculation (FCRC) process allows faculty contract administrators to recalculate the compensation for a group of faculty assignments, rather than manually updating each assignment individually. The process updates future FPA contracts that have not been made payable and where the contract amount computed when the process is run is different than the contract amount currently saved in Colleague.

The Job Applicant Import (JATI) and Pending Position Assignment (PEPA) processes have been updated to use the new GENDERS ValCode table.

The new Payroll Paid vs. Leave Posted (PDLV) report (CSV) compares the leave paid per the PAYTODAT file with the leave posted in the PERLEAVE file.

In addition, this release addresses other defects outlined in this document.

Problem/Issue

CR-000184474 Colleague Payroll – Need the ability to delete future PAYCNTRL records that were created by mistake in PPPR

PD0009310 Colleague Human Resources: Some customers are experiencing performance issues running PPGN

Documentation Issues Resolved:

CR-000183640 Colleague Self-Service Proxy User Guide needs to include what Name and Address Hierarchy is being used in the Employee Proxy setup for Time and Leave Approval lookups

CR-000184661 Colleague HR Using Payroll documentation – Needs updated to include Clear Pay Period Data (CPPU) process

CR-000184730 Documentation for TESS needs to indicate that “Enable Work Schedules” applies to both Self-Service and PPTe

PD0003691 Colleague HR – Online Field Help for LEAD Plan Year Start Date Needs Updating

PD0007123 Colleague HR – Online Documentation regarding deleting Leave Requests needs to be corrected

Client Impact

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

NEW FORMS:

FCRC - Faculty Contract Recalculation (ACO Menu)

PDLV (Payroll Paid vs Leave Posted)

Resolution

CR-000184474 Previously an end user was unable to remove a PAYCNTRL record that was created in error.

The Modify Pay Control (MPCL) process now allows the deletion of future PAYCNTRL records when

PCL.LAST.PROGRAM and PCL.CURR.PROGRAM are null and there are no TIMECARDS records.

PD0009310 Some customers were experiencing performance issues running Pay Period Generation (PPGN).

PPGN has been updated to improve its performance.

037189 2023 - Colleague HR Quality Release #3.1

Description:

November 16, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037189-1805*12

This software update delivers fixes for outstanding Colleague HR and Payroll issues.

Problem/Issue:

This release addresses the following defects:

PD0005240 Colleague HR – EHUP aborts with S.PROCESS.RETRO.LEAVE.TRANS – An unexpected error occurred in processing: No active leave accrual found on date 01/01/2023 error.

PD0008684 PLED Generates Error “Person's leave plan must have a latest starting balance update in PERLEAVE.

Run Leave Balance Transition utility (LBTU) utility” for Employees Assigned the Leave Plan After Plan Year Start Date.

PD0008715 PLVA Generates Error “1234567 no XXX starting balances on 07/01. Run LCOV for employee/leave plan”

for Employees Assigned the Leave Plan After Plan Year Start Date (e.g. New Hires, Leave Plan Switches). Employees hired after LBTU was run (or employees who changed leave plans since LBTU was run) did not get a starting balance,

so Personnel Leave Accrual (PLVA) would not process leave accrual transactions for these employees.

PD0008880 Colleague HR – When Leave Carryover Computation (LCOV) was run twice for the same Plan Year Start Date, the original Starting Balance was overwritten, causing an incorrect Starting Balance and Current Balance in Self-Service Leave.

PD0009215 Colleague HR – CSBU incorrectly reporting employees if there is an “R” rollover action prior to the “B” action for the same transaction date (e.g. 7/01/2023).

PD0009906 Colleague HR – MCKR is double deducting leave used when issuing a replacement check instead of reversing the leave used for the voided original check.

PD0010098 After installing SU 036684, LFTR Error: Leave will not transfer because balance is at accrual limit of "".

Client Impact

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

Resolution

PD0005240 Colleague HR – EHUP aborts with S.PROCESS.RETRO.LEAVE.TRANS – An unexpected error occurred in processing: No active leave accrual found on date 01/01/2023 error.

The Employee History Update (EHUP) process was calling the retroactive subroutine for ended leave plans. EHUP no longer calls the retro subroutine for ended leave plans.

PD0008684 PLED Generates Error “Person’s leave plan must have a latest starting balance update in PERLEAVE. Run Leave Balance Transition utility (LBTU) utility” for Employees Assigned the Leave Plan After Plan Year Start Date. Employees hired after LBTU was run (or employees who changed leave plans since LBTU was run) did not get a starting balance, so Person’s Leave Detail (PLED) was not allowing retro transactions to be entered. The logic for PLED has been updated to recognize the above scenarios and process them correctly.

PD0008715 PLVA Generates Error “1234567 no XXX starting balances on 07/01. Run LCOV for employee/leave plan” for Employees Assigned the Leave Plan After Plan Year Start Date (e.g. New Hires, Leave Plan Switches). Employees hired after LBTU was run (or employees who changed leave plans since LBTU was run) did not get a starting balance, so Personnel Leave Accrual (PLVA) would not process leave accrual transactions for these employees. The logic for PLVA has been updated to recognize the above scenarios and process them correctly.

PD0008880 Colleague HR – When Leave Carryover Computation (LCOV) was run twice for the same Plan Year Start Date, the original Starting Balance was overwritten, causing an incorrect Starting Balance and Current Balance in Self-Service Leave.

When LCOV is run in “regular” mode (Mid-Year Balance Adjustment flag is empty or No), if it finds an existing “B” record for an employee leave plan on the transaction date for which it is being run, it skips that leave plan and issues a warning.

PD0009215 Colleague HR – CSBU incorrectly reporting employees if there is an “R” rollover action prior to the “B” action for the same transaction date (e.g. 7/01/2023).

The Correct Starting Balance Utility (CSBU) was inaccurately including leave rollover hours from one plan into another as Adjusted amounts even though the rollover hours were already included in the Starting Balance, and therefore was reporting the employee as needing a change to their Self-Service leave page starting balance.

CSBU now correctly handles the rollover hours and does not report employees with this situation as needing a change to their starting balance.

PD0009906 Colleague HR – MCKR is double deducting leave used when issuing a replacement check instead of reversing the leave used for the voided original check.

Manual Check Replacement (MCKR) was deducting the leave used for the void as well as for the replacement. MCKR now credits the leave hours for the voided check.

PD0010098 After installing SU 036684, LFTR Error: Leave will not transfer because balance is at accrual limit of "".

LFTR will now successfully move leave transactions from PERLVDTL.FUTURE to PERLVDTL for leave plans that do not have an accrual limit.

Description:

December 21, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037829-1805*3

This release addresses two critical defects associated with the PLVA process.

Problem/Issue

PD0011680 Colleague HR: PLVA incorrectly reports error: 0000001 transaction date is in future plan year for leave plan SCK. Run LCOV for employee/leave plan.

Personnel Leave Accrual (PLVA) would not accrue hours for a non-traditional plan when the employee did not have a B record.

PD0011893 Colleague HR: After installing SU 037189, PLVA Creates PERLVDTL record with missing Action Type of "A" Since loading SU 037189 (released Nov 16, 2023), PLVA incorrectly creates PERLVDTL records missing the Action Type of "A" which causes the SS Leave page to incorrectly calculate the Earned column as well as the Current Balance.

CLIENT IMPACT:

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

Resolution

PD0011680 Colleague HR: PLVA incorrectly reports error: 0000001 transaction date is in future plan year for leave plan SCK. Run LCOV for employee/leave plan.

PLVA will now accrue hours for non-traditional leave plans when there is no "B" record for the employee.

PD0011893 Colleague HR: After installing SU 037189, PLVA Creates PERLVDTL record with missing Action Type of "A"

PLVA will now correctly populate the Action Type for all PERLVDTL records.

Information Technology

036676 Update to Envision Runtime for future enhancements

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU036676-485*22

Problem/Issue

Envision Runtime needed to be updated to support future enhancements.

Client Impact

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

TECHNICAL IMPLEMENTATION

This is an infrastructure update in support of future enhancements. You do not need to test your Envision Runtime functions.

This update includes a post-install subroutine which will set a few new variables needed by Envision Runtime.

Resolution

Envision Runtime has been updated.

036677 Update to Colleague for future enhancements

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU036677-1805*13

Problem/Issue

Colleague needed to be updated to support future enhancements.

Client Impact

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

TECHNICAL IMPLEMENTATION

This is just an update to the infrastructure to allow for future enhancements. You do not need to test your Colleague functions unless you had customized them.

CUSTOM IMPACT

Please run your custom impact report. You will just need to reapply your changes and regenerate the process. The changes that are being made on this update will not affect your customizations.

Resolution

Colleague has been updated.

036969 2023 update to Envision (5)

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU036969-485*21

Primary Keys were being deleted after software updates were being run on non-UniData databases. In order to prevent this, the processes behind Rebuild Missing Primary Keys (RPBK) will be invoked after software updates are run. Note that the issue of missing primary keys is only an issue for non-UniData database clients.

The Security Class Directory File Access (SCDA) form has been moved to the SAAS_SITEADMIN security class.

The Field Length for Institution ID on EDX Subscriber Definition (EDSD) was increased to 50 characters.

OAuth configurations were updated for new integrations, and OAuth Configuration (OACF) was added to the SAAS_SITEADMIN security class.

In addition, the following defects were resolved:

PD0009062

Reset Cust Pkgs for Reinstall (RCPR) prompted for LPR credentials for SaaS non-production environments. RCPR no longer prompts for LPR credentials for SaaS non-production environments.

PD0009745

Colleague UI help could cause a minidump when viewing all procedures.
UI help no longer causes a minidump.

PD0010157

Several links within the UI Help form on the main UI page were not updated to the new Ellucian Customer Center. The links are updated.

Problem/Issue

Envision Runtime needed to be updated and several defects needed to be addressed.

TECHNICAL IMPLEMENTATION

An automatic post-install subroutine does the following when you load this update: OAuth configuration values are updated and populated.

Resolution

Envision Runtime was updated and defects were resolved.

The following documentation has been updated as a result of this software update: Colleague SaaS Administration.

037036 Envision update in support of the 2023 Consolidated Full Release

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037036-485*11

This software update delivers Envision changes and updates in preparation for the 2023 Consolidated Full Release (CFR) package. The 2023 CFR package, Release 037035, will be an optional download available to clients on demand by retrieval code.

Problem/Issue

Several Envision changes were required prior to release of the new 2023 CFR to allow the CFR installation process to perform more smoothly.

Client Impact

Clients' LPRs are updated with data in support of the new 2023 Consolidated Full Release (CFR) package. Installing this software update allows the CFR installation process to perform more smoothly. You must install this package even if you do not intend to use the 2023 CFR.

Resolution

This software update delivers Envision changes necessary in support of a new Consolidated Full Release (CFR) package.

037037 Colleague Update in Support of Colleague Web API 2.1 and Self-Service 3.1

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037037-1805*29

This release resolves changes requests and ideas in Colleague Finance, Financial Aid, Human Resources, Student Finance, and Student and Student Planning.

Self-Service Benefits Enrollment has been updated to use the new GENDER.IDENTITIES Valcode table when specifying gender values.

Problem/Issue

Requests resolved by this update.

Core/General Self-Service

PD0004825 Colleague: Self-Service Proxy Form accepts a two digit year in Birth Date, adds "20" to the date, and upon submit gives "Proxy access could not be updated"

PD0006935 Colleague Self-Service Proxy - Candidate with Future Birth Date Stuck on RPPD

PD0004148 Self-Service profile images on roster and dialog are "squished"

PD0011281 Colleague Self-Service becoming unresponsive and requests fail without a lot of CPU being used

PD0008372 Self-Service MFA (Multifactor Authentication) uses the person's preferred email address to send the verification code and not the email hierarchy in PRXP

PD0010602 Colleague Self Service 3.x Issue with .Net URL's - "https://###.com/Student/Planning/"

Student Finance

PE0003165 Need Destination 7 awards that are set to Xmit Excess = N on AWD to calculate anticipated FA correctly.

PD0010618 Student Finance Account Activity and statements are missing the amount column in Tuition by Section.

PD0010724 Message displayed in Student Finance and on statement when it should not be displayed.

PD0010832: Student Finance Statement logos not displaying.

PD0011314 Student Finance issues error "Unable to retrieve disbursement data" when it should not.

Human Resources

PD0006436 Colleague HR – Self-Service 2.38 – Screen Reader Accessibility and keyboard navigation issues

PD0008743 Colleague HR SS Leave Request Error "Please enter a date on or after 7/1/2023" for Employees Assigned the Leave Plan year After Plan Year Start Date (e.g. New Hires, Leave Plan Switches)

PD0008856 Colleague HR SS Leave Approval – Leave Reporting Leave Requests Approved in the New Leave Plan Year, for Dates in the New Leave Plan Year, but Before LCOV has been Complete are Incorrectly Posting to PERLVDTL Instead of PERLVDTL.FUTURE

PD0011087 Colleague HR Self-Service 3.0 – Time Approval and Time Entry display "LeaveRequestDescriptionPrefix" in front of the leave plan name next to approved leave requests

Colleague Finance

PD0004085 Colleague Self-Service Finance Approve Documents, Approve and History Pages are Sorting by Date Incorrectly

PD0006656 Colleague Self-Service Finance Query Detail CSV is Missing GL Account Details

CR-000180082 Colleague Self Service Finance Query and Budget to Actuals do not display condensed transactions

Student & Student Planning

CR-000126189 Student Planning Degree Plan Archive Displays Inactive Programs in Version 2.6 +.

CR-000180156 My Progress is blank when the student's Academic Program does not have a department.

CR-000181424 DOC - Unofficial Transcript Format (TRFM) Font Size field help.

PD0001806 Self-Service Course Catalog displays only Waitlisted count instead of seat count for over-enrolled sections.

PD0009735 Restricting / Disabling the 'Courses - Guest Course Catalog' sitemap item does not disable GUEST course catalog access.

PD0009934 Building the source code for clients without a Student Planning license will result in compile errors.

PD0011211 Self -Service Student Planning 3.0: Student Gets "Update Failed" error Message - when attempting to Add courses or sections to their plan.

The documentation for the departmental oversight feature listed incorrect permissions.

Clients were not able to enable Registration mode in Self-Service 3.0.

Client Impact

Documentation updates related to this release:

Colleague Self-Service Base Configuration

Colleague Self-Service Proxy User

Customizing Colleague Self-Service

Customizing Colleague Web API

Self-Service Installation and Administration

Student Planning

Recruitment/Admissions Management

This section provides implementation information for back-office users and administrators and list new Colleague Self-Service pages, roles, and permissions.

CLIENT IMPACT / IMPLEMENTATION

TECHNICAL IMPLEMENTATION

Colleague Self-Service 3.1 requires ASP .NET Core Runtime 6.0.15 or higher with hosting bundle (for IIS runtime support) installed on servers running Windows Server 2016, 2019, or 2022.

ASP .NET 6 is compatible with ASP .NET Framework on the same servers. Ellucian and other third-party applications still require .NET Framework 4.7.2, removing .NET Framework will break Ellucian and other third-party applications.

Please review the updated installation instructions in the latest version of the Colleague Self-Service Installation and Administration guide on the Ellucian Documentation site. The installer needs to be run on a quiet site; additional implementation details can be found in the Setting Up Colleague Web API documentation.

System Administrators upgrading Self-Service .NET 6 for the first time should also note that there are now changes to the folder structure in the Colleague .NET 6 sites. For more information see Knowledge Article Folder Structure changes in Colleague .NET 6 Sites.

Financial Aid

Some of the html tags are not currently supported by the new .NET6 PDF tool. The vendor anticipates releasing updates to support these html tags. Clients should review their offer letters if they are using html tags. The two main types of tags mostly impacted in FastReports used by clients:

Lists (unordered/ordered/list : // tags)
Hyperlinks (<a> tag with support to href)

CUSTOM IMPACT

Clients who customize Colleague Self-Service 3.1 must use Visual Studio 2022 and SDK for .NET 1.28. If you are upgrading from a Colleague Self-Service version prior to 3.0 and have customization to Self-Service, you will need to reimplement all Self-Service customizations.

Please review the latest version of the Customizing Colleague Self-Service documentation which can be found on the Ellucian Documentation site.

See also Knowledge Article Colleague Customization Migration Tips for .NET 6

Resolution

This section provides full details about the new functionality included in this release as well as how each CR was resolved.

Core/General Self-Service

PD0004825 and PD0006935 When adding a new proxy on the Self-Service View/Add Proxy Access form, there is an option to prompt for the new proxy user's birthdate. If this option is selected, users adding a new proxy need to enter a birthdate with a valid 4-digit year and that is not in the future.

PD0004148 Improvements have been made to Self-Service person images for better display regardless of ratio.

PD0011281 Changes were made to prevent Colleague Self-Service from becoming unresponsive in certain circumstances.

PD0008372 The Proxy Email Parameters (PREP) form on-line help has been updated to better reflect when the email hierarchy is used. For multifactor authentication, the verification code will always be sent to the person's preferred email address. The hierarchy on PREP will be used to send the proxy users initial access information.

PD0010602 The default routes for all the Self-Service areas have been verified and updated as needed.

Student Finance

PE0003165: Anticipated FA needs to include the potential amount for destination 7 awards that have Xmit Excess set to No. Anticipated FA can now include the potential amount for destination 7 awards that have the Xmit Excess flag set to No. In order for Anticipated FA to include the potential amount, the Enable D7 Calculation indicator on Student Finance Parameters (STFP) needs to be set to "I" for include. For more information about the Include option, please see Article 000032352 Colleague AR/FA- FAQ for Student Finance and Anticipated FA.

PD0010618: Account Activity and the Student Finance statement were missing the amount column for courses listed in the Tuition by Section. The amount column is now being displayed for courses listed in the Tuition by Section on both Student Finance Account Activity and Student Finance statement.

PD0010832: A message of "The following section identifies transactions you have with the institution. They do not affect the balance above, only the amount currently due" was always displayed at the bottom of the Student Finance Account Activity and Student Finance statement even though the student did not have any additional transactions. The message is now only displayed at the bottom of the Student Finance Account Activity and Student Finance statement if the student has a payment plan or deposit due. Plus, the signs are now displayed between the formula icons on Student Finance Account Activity.

PD0010832: The institution's logo for the Student Finance statement was no longer displayed after loading Colleague Self-Service 3.0. The institution's logo can now be displayed on the Student Finance statement.

PD0011314: An error was displayed when trying to view the disbursement information in the Financial Aid section of Account Activity. The disbursement information can now be viewed in the Financial Aid section of Account Activity.

Human Resources

PD0006436 Various dropdowns on the Time Entry, Earnings, Statements, Time History, and Leave pages were not accessible to the screen reader; nor were they accessible using keyboard navigation. The dropdown menus are now accessible with screen readers and via keyboard navigation.

PD0008743 Employees were unable to enter leave requests for employees assigned the leave plan after the Plan Year Start Date before the Leave Carryover (LCOV) process was run. Leave requests can now be entered for employees that were assigned the leave plan after the current Plan Year Start Date.

PD0008856 Leave Reporting Leave Requests for the new plan year, that were approved in the current plan year, were incorrectly posted to PERLVDTL rather than PERLVDTL.FUTURE.

Leave Report Leave Requests for a future plan year will now correctly post to PERLVDTL.FUTURE when approved.

PD0011087 Time Approval and Time Entry were showing "LeaveRequestDescriptionPrefix" instead of the leave plan name.

Time Approval and Time Entry now display the leave plan name.

Colleague Finance

PD0004085 – The Approve Documents, Approve, and History Pages in Colleague Self-Service now sort the transactions by date appropriately.

PD0006656 – All GL account details are now exported to .csv from the Finance Query page in Colleague Self-Service.

CR-000180082 – The Finance Query and Budget to Actuals pages in Colleague Self-Service now display condensed transactions as expected.

Student & Student Planning

CR-000126189 Student Planning Degree Plan Archive Displayed Inactive Programs in Version 2.6 +. The Exclude Inactive Programs from Degree Plan Archive parameter has been added to the Course Planning Web Params (CPWP) form to allow clients the choice of whether to include inactive programs in the archive list.

CR-000180156 My Progress was blank when the student's Academic Program did not have a department. This issue has been resolved.

CR-000181424 DOC - Unofficial Transcript Format (TRFM) Font Size field help. The field help incorrectly stated a default Font Size of 9 inches instead of points. This issue has been resolved.

PD0001806 Self-Service Course Catalog displayed only Waitlisted count instead of seat count for over-enrolled sections. The Maintain Catalog Listing Seat Count Format if Waitlisted parameter has been added to the CPWP form to allow clients to choose the format of seat counts in Waitlisted sections on the Course Catalog Listing.

PD0009735 Restricting / Disabling the 'Courses - Guest Course Catalog' sitemap item did not disable GUEST course catalog access. Clients wanted to be able to disable the Guest Course Catalog while still allowing guest access to Instant Enrollment. This issue has been resolved.

PD0009934 Building the source code without a Student Planning license would result in compile errors. This issue has been resolved.

PD0011211 Self -Service Student Planning 3.0: Student got "Update Failed" error message when attempting to add courses or sections to their plan. This issue was related to students and the institution being in different time zones. This issue has been resolved.

The documentation for the departmental oversight feature listed incorrect permissions. This issue has been resolved.

Registration mode was not functioning in Self-Service 3.0. This issue has been resolved.

037203 Colleague update in support of 2023 Consolidated Full Release

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037203-1805*6

This software update delivers Colleague changes and updates in preparation for the 2023 Consolidated Full Release (CFR) package. The 2023 CFR package, Release 037035, will be an optional download available to clients on demand by retrieval code.

Problem/Issue

Several Colleague changes were required prior to release of the new 2023 CFR to allow the CFR installation process to perform more smoothly.

Client Impact

Clients' LPRs are updated with data in support of the new 2023 Consolidated Full Release (CFR) package. Installing this software update allows the CFR installation process to perform more smoothly. You must install this package even if you do not intend to use the 2023 CFR.

Resolution

This software update delivers Colleague changes necessary in support of a new Consolidated Full Release (CFR) package.

037204 Computed Column update for Colleague SaaS

Description:

December 14, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037204-485*18

Problem/Issue

All computed columns in Amazon Aurora PostgreSQL needed to be regenerated to avoid delimiter issues.

Client Impact

Ellucian's software is based on single source code architecture. To maintain the full potential, value, and benefits of your Ellucian software, it is critical that all software updates are loaded for both the base system and all licensed modules, regardless of whether the specific update is intended to resolve an issue on a particular database or to provide database changes for a specific module. All future Ellucian software updates and support will be based on the latest delivered version of software, so you must load this specific software update to take advantage of future updates and enhancements.

CUSTOM IMPACT

If you have modified any Ellucian-delivered computed columns for any database, you will need to regenerate them to ensure the runtime version of the computed column functions in line with your modification(s).

Resolution

Computed columns in Amazon Aurora PostgreSQL were regenerated.

037283 Envision Update in Support of OAUTH Authentication

Description:

October 19, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037283-485*2

This update includes a change to Envision Runtime to address a defect in Colleague Web API inbound OAuth.

Problem/Issue:

PD0009555 Colleague Web API OAuth issue with expired sessions

Client Impact

TECHNICAL IMPLEMENTATION

This update may be loaded without upgrading Colleague Web API to version 2.0.1 however, the correction are only applicable to Colleague Web API 2.0 and higher.

Resolution:

PD0009555 Colleague Web API OAuth has been updated to properly handle expired Colleague sessions.

Registration and Records

036214 Colleague Student and Core Quality Release 2023-4

Description:

December 14, 2023 The following software update has been released and is available to customers to be installed with the Envision Release System:

SU036214-1805*30

This update delivers resolution to various defects including the ability for clients to add institution defined non-Male/Female gender values.

Product Defects Resolved

CR 47919.78 Purpose for CDD element IFP.ALIEN.STATUS in INTER.FOREIGN.PERSON is not correct. This issue has been resolved.

CR-000155807 Reporting Term was not being populated when saving from the Transfer Equiv Evaluation (TEEV) form. This issue has been resolved.

CR-000168680 Colleague needs to allow a third Sex / Gender. The Person Sex (PRSX) form has been delivered to allow clients to populate the GENDERS table. The Male and Female values are delivered read-only but clients now have the ability to add other genders (sexes) to be used throughout Colleague (e.g. Sex field on NAE) using PRSX. Additionally, we have provided a Batch Update Person Gender (BUPG) process to move non-Male/Female values that may have been stored in the Gender Identity field on Addnl Bio Information (ABIO) form to the GENDER field in the PERSON table (e.g. NAE Sex field). See online help and the Using Core online documentation for more information.

CR-000184845 The End Student Programs (ESTP) process can hang. This issue has been resolved.

The S.GET.LAST.REPEATED.COURSE subroutine has had Unibasic INPUT statements removed so that GRDS Logging will no longer hang. This is one of the processes listed in CR 55769.52.

The Colleague Update in Support of Colleague Web API 1.40 and Self-Service 2.40 (PR00035352) delivered changes for the Section Summary (SSUM) form in support of Cross Registration and the Seat Management Service. This update made the following SSUM detail forms read only: Sections (SECT), Section Offering Info (SOFF), Section Requisites (SREQ), Section Restrictions (SRES), Section Financial Info (SFIN), Section Cross-List (SXRF), and Section Reg Date Ranges (SRGD). These changes have now been reversed and the forms can be used to make section updates.

Clients requested the ability to include sections with non-scheduled meeting attendance in the Calc Last Attendance Date field on the Student Withdrawal (SWTH) form. The Include Non-scheduled Meetings in LDA parameter has been added on the Academic Records Parameters (ACPR) form to resolve this request.

Documentation Updates

SPEEDE Transcript Interface
Using Colleague Core

Problem/Issue

Clients reported the defects and requested enhancements as described in the Description section of this release. See the Description for more information about the issues resolved with this software update.

Client Impact

This update resolves the defects and enhancements listed in the Description section of this release. See the Description for more information about the issues resolved with this software update.

NEW FORM

CORE > Person Dmographics – DM > Batch Update Person Gender (BUPG)

Resolution

The defects and enhancements resolved in this release no longer require customization or maintenance as they are now part of the baseline product.

037121 Colleague NSC Reporting Critical Update

Description:

This update contains critical NSC reporting corrections.

Problem/Issue

This update addresses the following change requests for National Student Clearinghouse (NSC) report processing:

PD-0009591: The NSC Student Data Extract (SITX) process leaves leading zeros off of the program length and Title IV program weeks fields when the student withdraws from summer after a first report has been filed.

PD-0009623: The SITX process incorrect sets the Status Start Date for a Graduation status to match the earliest course start date when a student graduates from a program that was never previously reported as enrolled in the archive, and there are multiple Course Start Dates.

Client Impact

The NSC processes in Colleague now allow more accurate reporting.

Custom Impact

If any custom changes have been made to any of the following forms/processes, they will need to be reapplied after loading this software update:

Modified Forms/Processes:

SITX – NSC Student Data Extract (LCB001)

Resolution

The Colleague NSC reporting processes were updated as follows:

The SITX process correctly includes leading zeros in the length fields.

The SITX process sets the correct Status Start Date for a Graduation status to match the date of the degree or certificate.

037253 Colleague PSIS 2023-4 Update

Description:

This update includes two missing Institutional Program Report fields - MPHEC_CIP1 and MPHEC_CIP2, along with improvements to several PSIS work file reports, and an adjustment to the PWBU form.

Problem/Issue

Two fields – CIP1 and CIP2 – were missing from Institutional Program Report processing. Several forms/processes needed updating to handle these fields.

The PSIS Work File Batch Update (PWBU) form needed the immigration field option to be part of the validated fields to update list instead of being listed as one of the non-validated fields to update.

Several work file report forms/processes needed to be updated to include a CSV output report option, along with a SIN masking option and other changes.

Client Impact

Colleague PSIS reporting now produces data more accurately.

Custom Impact

If any custom changes have been made to any of the following forms/processes, they will need to be reapplied after loading this software update:

Modified Subroutines:

S.CREATE.CNST.PROGRAM.WORK

Modified Forms/Processes:

PROG – Academic Programs (CDS021)
EPWG – PSIS Program Work File Gen (CNSTF008)
EIPW – PSIS Institutional Program Work Record (CNSTS005)
PIPE – PSIS Institutional Program Export (CNSTB034)
EIPF – PSIS Inst Pgm Work File Rpt (CNSTF014, CNSTB014)
EICF – PSIS Inst Course Work File Rpt (CNSTF012)
ESDF – PSIS Stu Desc Work File Rpt (CNSTF024)
ESPF – PSIS Stu Pgm Work File Rpt (CNSTF025)
ESCF – PSIS Stu Course Work File Rpt (CNSTF026)
ESTF – PSIS Transfer Work File Rpt (CNSTF027)
PWBU – PSIS Work File Batch Update (CNSTF033, CNSTB033)

Resolution

The Colleague PSIS reporting processes were updated as follows:

The institutional program report processes were updated to handle the CIP1 and CIP2 fields:

The Academic Programs (PROG) form was updated to include a new field – Second National ID. Clients may put a program's second CIP here, with the first CIP still in the National ID field.

The (PSIS Institutional Program (EPWG) process was updated to place the National ID in the CIP1 field, and Second National ID in the CIP2 field.

The PSIS Institutional Program Work Record (EIPW) form was updated to include the CIP1 and CIP2 fields so clients can maintain the data after building the work file.

The PSIS Institution Program Export (PIPE) process was updated to include the CIP1 and CIP2 fields in the export record.

The PWBU form was updated to list the CIP1 and CIP2 fields in the non-validated fields to update list so clients can batch update these fields in the work file.

The PWBU form was also updated so Immigration Status is now part of the validated fields to update. When selected, the target value clients can enter is restricted to a list of acceptable PSIS values.

The following work file report forms/processes were updated to include a CSV output report option, clarification of the name of the file a saved list must be written from, saved list ID checks when entering a saved list name, and a SIN masking option for the new CSV output report:

PSIS Inst Program Work File Report - EIPF
PSIS Inst Course Work File Report - EICF
PSIS Student Description Work File Report - ESDF
PSIS Student Program Work File Report - ESPF
PSIS Student Course Work File Report- ESCF
PSIS Student Transfer Work File Report - ESTF

Description:

October 19, 2023 - The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037399-1805*5

The College Board has released an updated layout for 2023-2024. This update delivers an updated import process for the new file layout for Colleague.

Note: This release replaced PR00037304.

Product Defects Resolved

PD0010099 SAT Test Score Import (SATI) erroring out with SATC.CURRENT.TEST.DATE: failed conversion. This error was due to the new layout. This issue has been resolved with the delivery of a new import process, SAT Test Score Import 2023 (SATN), that supports the new layout.

Documentation Updates

Recruitment and Admissions

Problem/Issue:

Imports of SAT scores using SATI results were failing starting with the Fall 2023 result format retrieved from the College Board. The College Board had released a new file layout that was not supported by SATI.

Client Impact

New fields delivered by the College Board in the new layout include:

RECRUITMENT_ELIGIBLE

PERCENTILE_STATE_TOTAL

PERCENTILE_STATE_RW

PERCENTILE_STATE_MATH

PERCENTILE_COUNTRY_TOTAL

PERCENTILE_COUNTRY_RW

PERCENTILE_COUNTRY_MATH

These fields are not imported by Colleague, so no new Translation Tables are delivered. See the 2023 File Notes tab in the updated sat_test_score_import_crosswalk.xlsx on our documentation site for an explanation of these fields.

Additionally, the College Board delivered updates to field explanations related to the digital SAT and blank values. Filler fields were used for the new fields above which changed the number of fields delivered in the CSV layout. Review the New/Updated College Board Comments column in the updated crosswalk for changes.

Resolution:

A new import, SATN, has been delivered along with an updated crosswalk for the 2023 layout.

037421 Colleague Update in Support of Grading

Description:

December 14, 2023 The following software update has been released and is available to customers to be installed with the Envision Release System:

SU037421-1805*1

This update will deliver the option to choose whether a person id or opers equivalent is recorded as the verified grade change operator when grading from Self-Service or any interface that submits grades through the Colleague WebAPI .

Product Enhancement Resolved

PE0002884 Self-Service Final Grading should use Username vs ID.

Problem/Issue

PE0002884 Self-Service Final Grading should use Username vs ID.

Client Impact

Clients will now have the option to record the person id of the person submitting verified grades or the opers equivalent.

IMPLEMENTATION

To record the PERSON ID of the user submitting grades from Self-Service in the STC.VERIFIED.GRADE.CHGOPR field, set the Person Id as Verified Grad Chg Oper field on GRWP to Yes. The default for this field is delivered as blank which is the same as No in order to preserve the current behavior. Note that the field help is missing for this parameter. See article KB000504918 for field help.

Resolution

PE0002884 Self-Service Final Grading should use User ID vs Opers Equivalent. Clients requested that the STC.VERIFIED.GRADE.CHGOPR record something more identifiable than the opers equivalent. The new Person ID in Verified Grad Chg Oper parameter has been added to the Grading Web Parameters (GRWP) form to give clients the option of storing either the person ID of the user submitting the verified grade or the Envision Opers Equivalent in the STC.VERIFIED.GRADE.CHGOPR field.

California

037027 2023 Q3 California Student Reporting Quality Update

Description:

October 19th, 2023 - The following software update has been released and is available to clients to be installed with the Envision Release System:

SU037027-1805*16

This software update provides updates to California MIS report processing.

Problem/Issue:

This update addresses the following product defects regarding the California MIS report processes:

PD0002382 – The Build Course (CB) Data (CACB) process does not create the Batch Error report with the errors detected during the process when the only errors are "GI01:<course> does not have a unique identifier on ACOI."

PD0002680 – The Student Identifier (SB00) in the California MIS Student Calworks (SC) and Student PBS (PS) export files were incorrectly right-justified rather than left-justified.

PD0005377 – On the Build Stu Basics (SB) Data (CASB) form when "Store Derived SB11 and SB15 Data" field is populated, the data from CASTSB.SB11 and CASTSB.SB15 in CAST.SB.WORK should get stored in STTR.CAST.SB11 and STTR.CAST.SB15 in STUDENT.TERMS, but this doesn't work. No data is stored in STTR.CAST.SB11 and STTR.CAST.SB15.

PD0007907 – The position of "Bacc Program Code" field (SG12) on the Student SG Data (SSGD) form needed to be in between SG11 and SG13 fields for ease of use.

PD0010154 - After running CASB, it was discovered that null records were being created in the BOGG_2023 file.

PD0008861 – The California MIS Data Elements document needed to be updated to include an additional logic of deriving SB11. This logic already exists in the system, however, wasn't included in the documentation.

This update also addresses the following issues:

The data elements SG25 – Campus Housing Status and SG26 – Dual Admission Status UC/CSU needed to be added to the SG Populate Form (CSGP).

The data elements SG25 – Campus Housing Status and SG26 – Dual Admission Status UC/CSU needed to be added to the SSGD form.

The derivation of data elements SG16 – Student Homeless Status and SG19 – Student Seasonal Farm Work Status had to be updated to include data coming into AMS2 form from CCC Apply application.

The derivation of data elements SG25 and SG26 had to be updated to include the condition of checking for values in the newly added fields on SSGD.

Student Group (SG) Export Process (CSGE) had to be updated to populate SG26 with values other than just XX. Field help on Applicant Miscellaneous 2 (AMS2) form had to be updated to indicate which data element from CCC Apply was the source for most of the fields.

Client Impact:

California MIS reporting now produces more accurate results.

Custom Impact

If any custom changes have been made to any of the following processes, they will need to be reapplied after loading this software update:

Processes:

Student SG Data (SSGD) – CASTF201 Student PBS (PS) Export (CPSE) – CASTB108Student CalWORKS SC Export (CSCE) – CASTB111Build Course

(CB) Data (CACB) – CASTF001Build Stu Basics (SB) Data (CASB) – CASTB016DSG Populate Form (CSGP) –

CASTF200, CASTB200Build Student

Groups (SG) Data (CASG) - CASTB203, CASTB203B, CASTB203C, CASTB203D, CASTB203I,

I_SUBR.CAST.SGStudent Group (SG) Export Process

(CSGE) – CASTB204

Entities:

STUDENT.GROUPS

Resolution:

The Colleague California MIS reporting processes were updated as follows:

The CACB process has been updated to generate the Batch Error Report even when the only error generated is "GI01:<course> does not have a unique identifier on ACOI."

The Student PBS (PS) Export (CPSE) and Student CalWORKS SC Export (CSCE) processes have been updated such that Student Identifier field is left-justified.

The CASB process has been updated such that,

The data from CASTSB.SB11 and CASTSB.SB15 in CAST.SB.WORK gets stored in STTR.CAST.SB11 and STTR.CAST.SB15 in STUDENT.TERMS, when

"Store Derived SB11 and SB15 Data" field is marked as Yes. The process no longer creates null records in BOGG_ACYR file when it is run.

The CASG process has been updated such that,
The derivation of data elements SG16 and SG19 will also take into consideration values that come in via the CCC Apply application to the AMS2 form. The
derivation of data elements SG25 and SG26 will take into account the values provided on the SSGD form.

The SSGD form has been updated such that,
"Bacc Program Code (SG12)" field has been moved to be in between "NextUp/CAFYES Status" and "CCAP Status" fields. Two new fields named "Campus
Housing Status (SG25)" and "Dual Admission Status UC/CSU (SG26)" have been added.

The validation tables used in "Populate SG Field" and "Value to Populate" fields have been updated to include "SG25
Campus Housing Status", "SG26A
Dual Admission Status UC" and "SG26B Dual Admission Status CSU."

The California MIS Data Element document has been updated to include all the scenarios to derive SB11 Data element.
Student Group (SG) Export process (CSGE) has been updated to populate SG26 with values as derived in the
CAST.SG.WORK

Field help on Applicant Miscellaneous 2 (AMS2) form now clearly states which data element from CCC Apply is the
source for following fields,
Parent 1 First Name, Parent 1 Last Name, Parent 2 Last Name, Parent 1 Relationship, Parent 2
Relationship, Homeless
Youth, Consent, Comfortable with English, Legal Dependents under 18 years old

037190 California Student Reporting Quality 2023 Q4 Update

Description:

December 14th, 2023 - The following software update has been released and is available to clients to be installed with the Envision Release System:

SU037190-1805*28

This software update provides the following updates to California report processing.

Problem/Issue

This update addresses the following product defects regarding the California report processes:

PD0008992 – Duplicate SX04 data is being generated when a course pans across multiple terms.

PD0009851 – The 320 Section Detail Report created when 320 Printed Reports (CA3R) process is run, displays RFTES too short. The first digit gets truncated for high values of RFTES.

PD0011297 – When the CA3R process is run, the summary and detail totals are different.

PD0011607 - Validations missing in runtime specifications for entities used by CCC Apply Application Import.

This update also addresses the following issues:

The derivation of the data element SB36 – Student Transgender had to be updated.

Applicant Miscellaneous 2 (AMS2) and California College Promise Grant (CCPG) – the Colleague fields "Num of Legal Dependents Under 18", "Num of Legal Dependents 18 or Older" and "Date" have inconsistencies due to association.

The CCPG import process needs to update the CCPG form with Student Parent data being sent by the CCC Tech Centre.

Client Impact

California reporting now produces more accurate results.

New Forms

Application Import Parameters (APIP) – AMP012

New APIs

d01-secschool

d01-appsvc-defaults

Updated APIs

persons v12

admission-applications v16

person-external-education v1

Custom Impact

If any custom changes have been made to any of the following processes, they will need to be reapplied after loading this software update:

Processes:

320 Printed Reports (CA3R) - S.CALC.CAST.FTES, CASTR023C

California College Promise Grant (CCPG) - CASTS127

Applicant Miscellaneous 2 (AMS2) - AMS0382

Build Stu Enroll (SX) Data (CASX) - CASTB011

Build Stu Basics (SB) Data (CASB) - CASTB016D

S.COPY.APPL.TO.STU

UPDATE.ADM.APPLICATION

Entities:

PERSON
APPLICANTS
APPLICATIONS
PER.MILITARY
SECSCH.TRANSSCRIPTS
BOGG.ACYR

CCC Apply API Extensions:
S.CALC.CATALOG.TEMPLATE
S.EXTEND.TEMPLATE.CCC.D01
D01-1000
D01-1140
D01-1147
D01-1196
D01-1216
D01-1217
ADMISSION-APPLICATIONS, CTX changes to UPDATE.PROSPECT.OR.APPLICANT
CA-PROMISE-GRANT-APPLICATIONS
D01-APPSVC-DEFAULTS
D01-SECSCHOOL
PERSON-EXTERNAL-EDUCATION

Resolution

The Colleague California reporting processes were updated as follows:

Build Stu Enroll (SX) Data (CASX) process has been updated to derive SX04 based on the Section End Date on California MIS Report Dates (CAMD) form, rather than the System Date.

The number of characters displayed on the Detail Report for FTES has been increased from 8 characters to 9, to allow the report to display more values in the Print Section Detail Report created when CA3R process is run.

The S.CALC.CAST.FTES process has been updated to return the right Summary and Detail totals.

The Build Stu Basics (SB) Data (CASB) process has been updated for the derivation of data element SB36 to be updated to pick value from the "Transgender" field on Addnl Bio Information (ABIO) form, instead of the Gender Identity field on ABIO.

AMS2 and CCPG – the Colleague entity names for the fields "Num of Legal Dependents Under 18", "Num of Legal Dependents 18 or Older" and "Date" had to be updated due to inconsistencies in association. SB39 derivation has been appended to include these changes.

Business Process API for CCPG has been updated to bring in the Student Parent value into the "Num of Legal Dependents Under 18" field on CCPG form.

A new form named Application Import Parameters (APIP) has been created for schools to provide parameters to be used when applicants are converted to students via the CCC Apply process in Colleague.

The runtime specifications for the following entities were redelivered with correct validations.

PERSON
APPLICANTS
APPLICATIONS
PER.MILITARY
SECSCH.TRANSSCRIPTS

PE0003291 - For CCC Apply Application Import, the following APIs needed to be extended.

persons v12

admission-applications v16

person-external-education v1

For CCC Apply Application Import, the following new APIs were released.

d01-secschool

d01-appsvc-defaults

Texas

036608 Texas Student Update 2023-3

Description:

September 28th, 2023: The following software update has been released and is available to clients to be installed with the Envision Release System:

SU036608-1805*24 (PR00036608)

This software update provides updates to Texas Student report processing.

Problem/Issue

The BCEW process does not recognize an active program when the student's earliest active program has an academic level that was excluded in the "Acad Levels To Exclude" parameter. This resulted in the BCEW process leaving the CIP and Major Type fields blank in the work file.

By the end of 2023, Colleague will allow users to enter values other than M or F in the NAE Sex field. (Users will create these values via the new PRSX form.) The NAE Sex field drives the value of the Men/Women counts on several Texas ST work file builds and exports, along with the Texas Work File To CSV (TWTC) process. These processes needed to be updated to handle non-M/F values in the NAE Sex field when totaling the Men/Women values, as no other genders are allowed.

The Update TSI Exemption Status (UTES) process, or the subroutine called when accessing the Texas Success Initiative (TXTS) form, wrongly results in exemptions awarded when the student takes a multi-part ACT test (including a composite test) and fails one of the parts. Also, the date taken was not checked in all circumstances – this information is needed in order to properly set the ACT Taken After 2/14/2023 field on the TX Dev Ed Exemptions/Waivers (TXDE) form.

Some CSVs created by the Texas Work File To CSV (TWTC) process, along with the CSVs created by several export processes, needed to be updated to include all current fields and field labels.

Client Impact

Texas Student reporting now better processes the CB reports and the FA report.

Custom Impact

If any custom changes have been made to any of the following processes, they will need to be reapplied after loading this software update:

New Translation Tables:

TXST.GENDERS

Modified Subroutines:

S.CREATE.CBM008.WORK

S.EVAL.TSI.EXEMPTIONS

Modified Forms/Processes:

TXME – Texas CBM00M Export (TXSTB086)

TWTC – Texas Work File To CSV (TXSTB041)

BCEW – Build C1E1 Work File (TXSTB092B)

TX1E – Texas CBM001/CBM0E1 Export (TXSTB076)

TSAE – Texas CBM00A Export (TXSTB083)

TX2E – Texas CBM002 Export (TXSTF091, TXSTB090)

BFWF – Build Faculty Rpt Work File (TXSTF001)

TXNE – Texas CBM00N Export (TXSTB091, TXSTB015B)

TX9E – Texas CBM009 Export (TXSTB081)

TSAE – Texas CBM00A Export (TXSTB083)

TXCX – Texas CBM00C Export (STR115)

Resolution

The BCEW process now selects the active program with the earliest start date that does not have an academic level excluded by the parameter field.

Ellucian delivered a new translation table – TXST.GENDERS. If the user creates new values for the NAE "Sex" field and the user would like to report those values as M or F, the user needs to populate this translation table to translate the new values to M or F. The work file build and/or export processes will then populate the Gender field as follows:

If a non-M/F value is present on NAE and is present on the translation table, the work file build will report the translated value of M or F.

If a non-M/F value is present on the NAE form, but not represented in the translation table, the work file build will leave the student's gender blank in the work file, with a warning that the student's gender could not be determined.
If a value of M or F is present on the NAE form, that value will be written to the work file. (Users do not need to translate the values of M or F to "M" and "F" on the table- when the work file build encounters a value of M or F on the NAE form, the M or F is still reported.)
If the Sex value on NAE is blank, the work file build will issue a warning that the student's gender could not be determined.

The UTES process (and TXTS) correctly awards exemptions in all circumstances. Also, the date is always checked, regardless of whether an exemption is awarded based on the top half of the TSI Exemption Tests (TTRT) form or the combinations listed at the bottom of the form.

The TWTC process was updated to accurately create CSVs for the CBM00A, CBM00C, CBM001 and CBM0C1 work files. Also, the Texas CBM00A Export (TSAE), Texas CBM00C Export (TXXC), and Texas CBM0E1/C1 Export (TX1E) processes were updated to create more accurate, updated CSV reports.

037576 Colleague Texas Student 2023 Q4 Update

Description:
2023 Q4 update to Colleague Texas Student report processing

Problem/Issue
The subroutine used by the Update TSI Exemption Status (UTES) process or called when accessing the Texas Success Initiative (TXTS) form handled tests listed on the top half of the TSI Exemption Tests (TTRT) form incorrectly when assigning exemptions.

Also, when using a test combination at the bottom of the TTRT form to assign an exemption, the UTES/TXTS processes assigned exemptions with a start date matching the date taken of the earlier test instead of the later test.

Client Impact
Exemptions are now calculated properly when using ACT tests.

Custom Impact
If any custom changes have been made to any of the following processes, they will need to be reapplied after loading this software update:

Modified Subroutines:
S.EVAL.TSI.EXEMPTIONS

Resolution
The UTES/TXTS subroutine properly assigns exemptions based on the top half of the TTRT form.

When using the ACT test combination to assign an exemption, the UTES/TXTS subroutine marks the exemption start date to match the date taken of the later test.