Maximizing Self-Service for the Faculty and Advisor Roles

Faculty Workshop

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Learning Goals for This Session

- Understand what Self-Service is

- Understand the relationship between the Catalog, Colleague and Self-Service

- Learn how to use the Faculty portal functions for efficient permissions management.

- Learn how to use the Advisor portal functions for advising and general student academic information

- Leave this session empowered by Self-Service!

Part I – What is Self-Service?

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Self-Service is the User Interface (UI) that pulls data from Colleague and makes it available to users.

It's not "something new." It's just a new tool for accessing information by the campus community.

Self-Service is not...

1. Magic

2. A mind-reader

3. One-stop shop for anything and everything we may want to access

Colleague-BSC's Operating Backbone

Colleague is the Enterprise Resource Planning (ERP) software that BSC uses to manage day-to-day business activities.

- Student information
- Registrar services (transcripts, registration, academic programs)
- Financial Aid
- Student Accounts
- Human Resources
- Academic Advising (Degree Audit: Student Planning and Progress)

Colleague

All functions in Colleague require security clearance.

Self-Service allows a more general access to information that is necessary for academic advising, registration, and general student academic information.

Why does this matter?

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In a general sense, understanding the relationship between Colleague and Self-Service is key in understanding what is available to the user in Self-Service and limitations to access of information.

BUT...

BUT…

The more pertinent reason for understanding how Colleague and Self-Service relate in this presentation is to respond to a common "comment/complaint" from students and faculty…

"Self-Service *Progress* is wrong."

Self-Service *Progress*

- Pulls 100% from Colleague Program Requirements (REQU)
- Colleague Program Requirements are taken directly from the BSC Catalog.
- Student Catalog of Entry (First term at BSC) is the "default" Catalog year for their Academic Program which includes *Explorations* and the major, minor, or other programs.
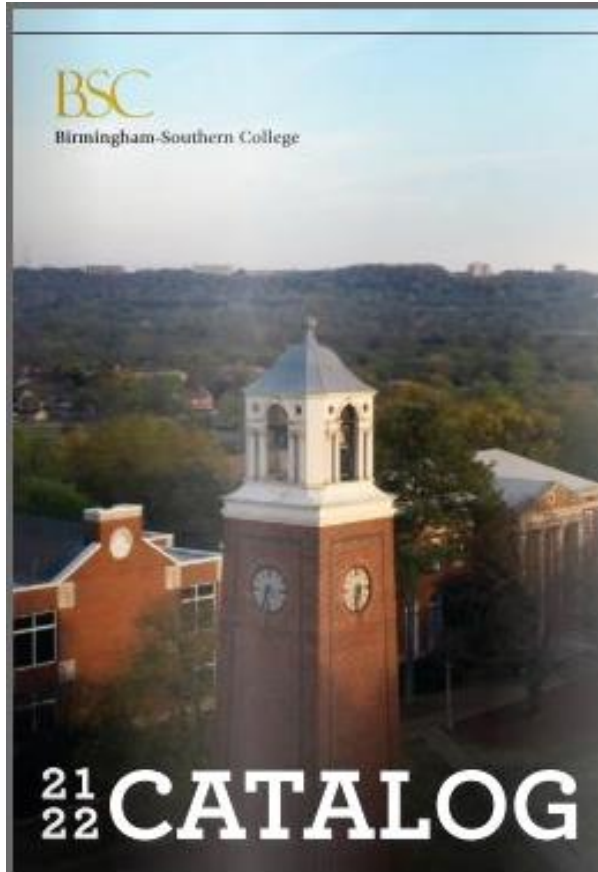- Colleague does not read minds. Students must keep their academic programs updated with Academic Records.

For training purposes, we are going to look at the B.S. in Psychology.

B.S. in Psychology

Colleague holds three versions of the Psychology major requirements (REQU):

95	BS.PY.MAJ.11	Psychology Major Requirements	06/16/15
96	BS.PY.MAJ.15	Bachelor of Science in Psychology	07/31/15
97	BS.PY.MAJ.21	Bachelor of Science in Psychology	07/14/21

Psychology major requirements are new for AY 21-22

Psychology   Bachelor of Science

Major Requirements

The following courses are required (12 units):
- PY 101
- PY 221
- PY 222
- PY 301
- PY 312

three units from the following:
- PY 211
- PY 224
- PY 313
- PY 370
- PY 372

three elective units in PY

one unit in PY 410 or 450, or 2 units of PY E499 or PY 470 followed by PY 472;
   PY 472 will count as one of the three elective psychology units

Majors should take PY 221 and PY 222 consecutively and are strongly encouraged to complete them by the end of the sophomore year. All majors will complete a comprehensive assessment in psychology as part of the senior seminar.

The Colleague Program Requirement "rules" reflect the Catalog requirements 100%

Specifications

Save	Cancel	Timestamp	Download	Find...

```
  # GROUP.ID 18633;
PRINT "Major Requirements"
    Take PY*101 PY*221 PY*222 PY*301;
  # GROUP.ID 18634;
PRINT "Bio-Psychology Elective"
    Take PY*312;
  # GROUP.ID 18636;
PRINT "Three courses chosen from PY*211, 224, or 313"
    Take 3 courses;
    From courses PY*211 PY*224 PY*313 PY*370 PY*372;
  # GROUP.ID 18637;
PRINT "Take three Psychology electives"
    Take 3 courses;
    From Subject PY;
    Except courses PY*204 PY*204L PY*298 PY*304 PY*304L
    PY*370 PY*370L PY*372L PY*398 PY*450 PY*498;
```

Self-Service *Progress* pulls the REQU for the major by Catalog Year

Specifications

Save | Cancel | Timestamp | Download | Find...

```
  # GROUP.ID 18633;
PRINT "Major Requirements"
    Take PY*101 PY*221 PY*222 PY*301;
  # GROUP.ID 18634;
PRINT "Bio-Psychology Elective"
    Take PY*312;
  # GROUP.ID 18636;
PRINT "Three courses chosen from PY*211, 224, or 313"
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    PY*370 PY*370L PY*372L PY*398 PY*450 PY*498;
```

At a Glance

Cumulative GPA:	(2.000 required)
Institution GPA:	(2.000 required)
Degree:	Bachelor of Science
Majors:	Psychology
Departments:	Psychology
Catalog:	21-22

Description
Upon completion of the psychology major, students … m

Bachelor of Science in Psychology

Must have 2.000 minimum GPA for this requirement.
Must have 5.00 Institution Credits for this requirement. Institution Credits Applied: 0.00

Complete all of the following items. ⚠ 0 of 2 Completed. Hide Details

A. Major Requirements

Complete 12 units with a minimum 2.000 major GPA. Students who double major with one major being disciplinary and the : elective courses within one major towards satisfaction of the requirements of the other major.

Complete all of the following items. ⚠ 0 of 4 Completed. Hide Details

1.
Major Requirements ⚠ 0 of 4 Courses Completed. Hide Details

Status	Course	
✓ Registered	PY*101	Introduction to Psychology
ⓘ Not Started	PY-221	Statistics & Research Meth I
ⓘ Not Started	PY-222	Statistics & Research Meth II
ⓘ Not Started	PY-301	Psychological Sci Literacy

2.
Bio-Psychology Elective ⚠ 0 of 1 Courses Completed. Hide Details

Status	Course	
ⓘ Not Started	PY-312	Biological Psychology

3.
Three courses chosen from PY*211, 224, or 313 ⚠ 0 of 3 Courses Completed. Hide Details

Status	Course	
ⓘ Not Started	PY-211	Social Psychology
ⓘ Not Started	PY-224	Developmental Psychology
ⓘ Not Started	PY-313	Abnormal Psychology

Colleague is not a mind reader.

Self-Service *Progress* pulls the REQU for the major by Catalog Year

When a department changes major requirements,

all current declared majors are not automatically "migrated" to the new requirements. Faculty cannot "verbally" tell majors that they are on track to graduate if they just take the new courses.

Current majors are still associated with the major requirements in their Catalog year in Colleague.

What are options when major requirements change?

1. A teach-out plan for current majors providing needed courses to fulfill the requirements in their Catalog. If only course numbers are changed, this generally won't have an adverse affect on students.

2. Keep track of all majors who are affected by the change in requirements. Make a plan for them to complete requirements through "Exceptions and Overrides" (EXOV). The Degree Audit Specialist has to manually apply the exceptions to **each student's academic program**. **This is a multi-step process and is very time consuming when large numbers of students are affected.**

3. Official communication with Academic Records to change the student's Catalog year. This will apply the new major requirements.

If course numbers change, that should automatically update in Colleague.

Academic Records *equates* the course in Colleague so *Self-Service* should pull the new course into a requirement.

PY 204 (QA) = PY 221 (QA)

1.
Major Requirements ⚠ **1 of 3 Courses Completed.** Hide Details

Status	Course	
✓ Completed	PY*101	Introduction to Psychology
🕐 Planned	PY-221	Statistics & Research Meth I
ⓘ Not Started	PY-304	Research Methods for Psych

Important note on item number 3:

EVERY major is also LINKED to *Explorations:*

125   EX.GEN.18   Explorations 18

3. Official communication with Academic Records to change the student's Catalog year. This will apply the new major requirements.

This works only if *Explorations* requirements are the same as stated in the student's Catalog.

**If General Education requirements change with a Catalog, then the student MUST adopt the NEW general education requirements in order to follow the NEW major requirements. It is NOT possible to Mix and Match General Education and majors from different Catalog years.

This student is under Catalog 19-20 so the major requirements are still reflecting the 19-20 requirements on *Progress.* It will look "wrong."

Senior Capstone

Complete a Senior Capstone experience.

Complete 1 of the following 2 items. ⚠ **0 of 1 Completed.** Hide Details

1.
Take PY*450 ⚠ **0 of 1 Courses Completed.** Hide Details

Status	Course	
ⓘ Not Started	PY-450	Sr Seminar: Adv Topic in Psyc

2.
Take PY*470 and 472 ⚠ **0 of 2 Courses Completed.** Hide Details

Status	Course	
ⓘ Not Started	PY-470	Sr Sem: Research in Psych I
ⓘ Not Started	PY-472	Sr Sem: Research in Psych II

xplorations Term Requirements

< >

BS in Psychology
(1 of 1 programs)

At a Glance

Cumulative GPA:	2.427 (2.000 required)
Institution GPA:	2.427 (2.000 required)
Degree:	Bachelor of Science
Majors:	Psychology
Departments:	Psychology
Catalog:	19-20
Anticipated Completion Date:	5/30/2023

Description
Upon completion of the psychology major, students ... more

Looping back around...

Self-Service is a User Interface.

Self-Service is intrinsically linked to Colleague.

Colleague is the backbone of all day-to-day operations at BSC.

Self-Service *Student Planning* and *Progress* pull directly from Colleague program requirements.

Colleague Program Requirements (REQU) are programmed to the Catalog requirements.

Students are associated with their Catalog year of entry.

Student Program Requirements are tied to their Catalog year of entry.

Part II: The Faculty Portal

Part II: The Advising Portal (ALL Faculty)