Course Description:
Colleague is CSM’s primary information management system used to provide products, services and information to our customers. This software solution is specifically designed for higher education institutions. It is an integrated system which allows sharing of information between components of the student system, financials and human resources. This course will provide you with an introduction and the fundamentals of using Colleague.

Course Outline (cont’d):
Module 4 – More Work with Forms
- Course section naming
- Course section lookups
- Terms
- Field Types
- Code files, data standards
- Wildcard lookups
- Detailing, forms path
- Saving, canceling

Module 5 – Process Parameters, Running Reports
- Course section naming
- Course section lookups
- Terms
- Field Types
- Code files, data standards
- Wildcard lookups
- Detailing, forms path
- Saving, canceling

Module 6 – Additional Resources
- Keyboard shortcuts
- Process help
- Field help
- Ellucian Hub

For more Technical Training information, visit:
http://info.csmd.edu/Training/technical

Or contact:
Technical Training Coordinator
Wendy Cleary
Ext. 7610, email wendyc

Technology Associate
Debbie Proctor
Ext. 7729, email debrap

Audience:
- Employees with a need to access Colleague

Prerequisites:
- Basic computer literacy
- Some experience working in a Windows environment
- Recommended – HRD-1012 FERPA Training
- Note: This course is the prerequisite for all other Colleague training and is required for access to production account (COLLIVE)

Course Format:
- Online, self-paced
- Instruction provided via demonstration videos
- Demonstrated functions should be replicated in Colleague training account

Course Outline:
Getting Started Module
- Overview, objectives
- Course structure
- Content notes

Module 1 – What is Colleague?
- About Ellucian, Colleague
- CSM Colleague Accounts
- Logging in

Module 2 – Colleague Organization
- Customize preferences
- Navigation tab and applications
- Forms organization
- Custom menu, forms

Module 3 – Opening Forms & Lookups (Person)
- Opening forms
- Person lookups, former names
- Form-less person search
- Context area and cards
- Using Favorites

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