



# Colleague User Interface 4

## Navigation and Functionality

© 2010 Datatel, Inc. All rights reserved. Datatel® and Colleague® are registered trademarks of Datatel, Inc. All other names, products, and services mentioned are the trademarks or registered trademarks of their respective owners. All information contained in this course material is confidential and property of Datatel, Inc. To copy, print, distribute, and/or reproduce, in any manner the information contained within this document, you must obtain prior written permission of Datatel, Inc. In consideration of this authorization, you agree that any copy of these documents, which you make, shall retain all copyright and other proprietary notices contained herein.

The information contained in this document is believed to be accurate in all respects but is not warranted by Datatel, Inc. The information is subject to change without notice and should not be construed in any way as a commitment by Datatel, Inc., or any of its affiliates or subsidiaries. Datatel, Inc., and its affiliates or subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes.

# Table of Contents

---

Overview.....	5
Purpose.....	5
Objectives .....	5
Optional Functionality .....	5
Your Learning Materials.....	5
Elements of the UI Window .....	6
Introduction.....	6
UI Window Components .....	6
Context Area.....	6
Context Area Buttons.....	7
UI Form.....	7
Forms and the Context Area .....	8
Navigation Panel.....	8
Person Search.....	9
Introduction.....	9
Procedure for Person Search.....	9
Procedure for Advanced Person Search.....	9
Search Results Panel Views.....	10
Card View vs. Grid View.....	11
Form Search .....	12
Introduction.....	12
Procedure for Form Search .....	12
Search Results Panel View .....	12
Favorites.....	13
Adding and Opening Favorites .....	13
Introduction.....	13
Adding people to Favorites .....	13
Adding forms to Favorites .....	13
Procedure for Adding People and Forms to Favorites.....	14
Procedure for Opening Favorites .....	15
Creating a Shared List.....	17
Introduction.....	17
Procedure for Creating a Shared List.....	17

Using a Shared List.....	19
Introduction.....	19
Procedure for Using a Shared List .....	19
Additional Features .....	21
Preferences .....	21
Introduction.....	21
Options Available in Preferences.....	21
Options Available in Preferences, cont.....	22
FAQs .....	23

---

# User Interface 4 Navigation and Functionality

## Overview

---

**Purpose** The purpose of this document is to provide an overview of the navigation and functionality available with the Colleague User Interface (UI) 4.

---

**Objectives** As a result of this document, you will be able to:

- Describe the structure of a UI 4 Window.
- Discuss new features available with UI 4.
- Use enhanced person and form search capabilities.
- Save forms and people to favorites.
- Change user preferences.

---

**Optional Functionality** UI 4 provides features that are optional and may not be available at your institution. We have included references to these features but you will want to check with your Administrator to determine if they are available at your institution.

These features include:

- **Photo Display:** The ability to link student and staff photos to person records.
  - **Mapping:** The ability to map addresses listed in the Context Area of the UI 4 Window.
- 

**Your Learning Materials** The functionality that is described in your learning materials still exists. By reading this insert, you can utilize UI 4's enhanced person and form search functionality and navigation options.

---

# Navigation

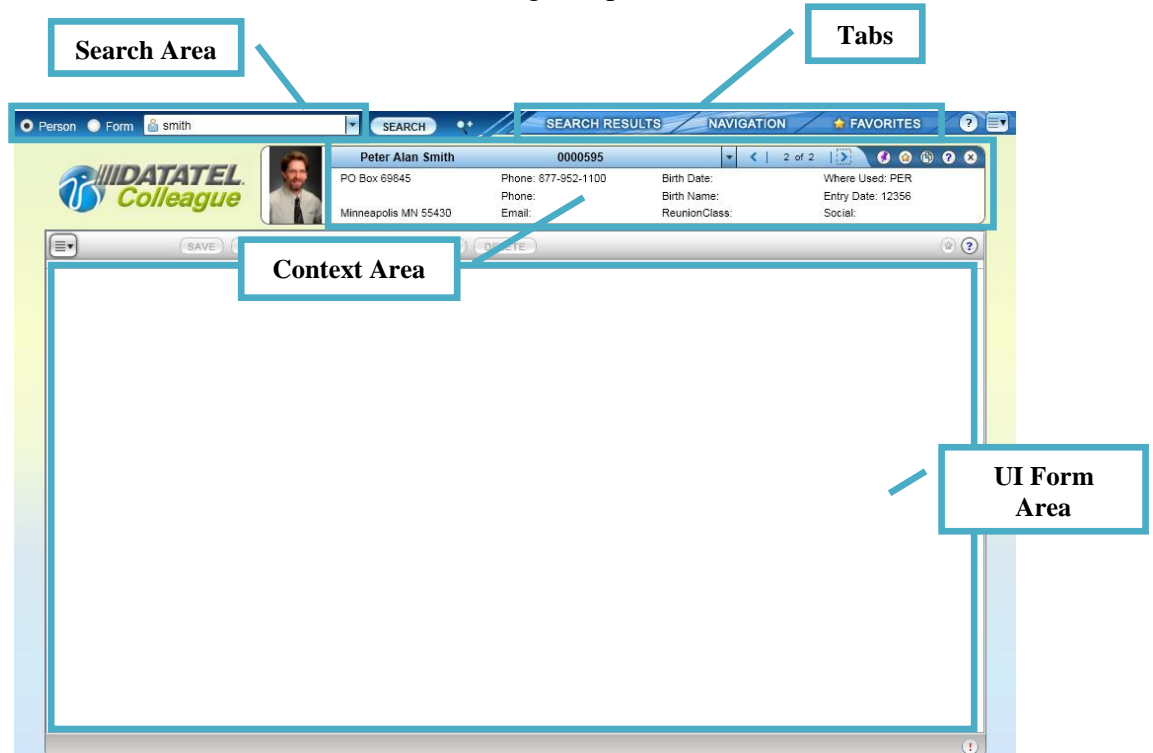
## Elements of the UI Window

### Introduction

The UI Window has several new features that exist with UI 4. We have included descriptions of the key features below.

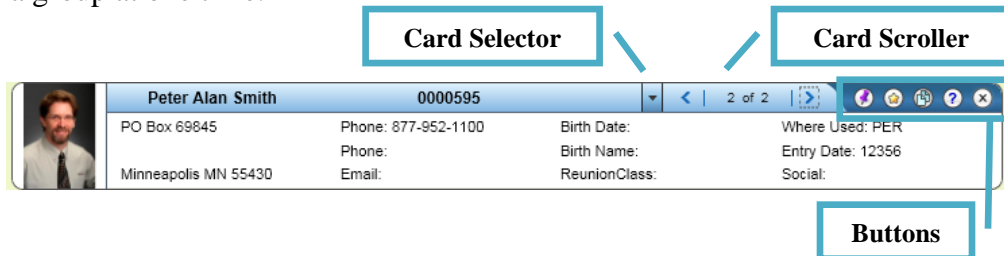
### UI Window Components

The UI Window consists of the following components



### Context Area

The Context Area displays information about the person or organization you are currently working with. Each person/organization is represented by a "card". The Context Area can hold multiple person cards or organization cards at a time. Only one type of card (person or organization) can be held in a group at one time.








*Continued on next page*

## Elements of the UI Window, Continued

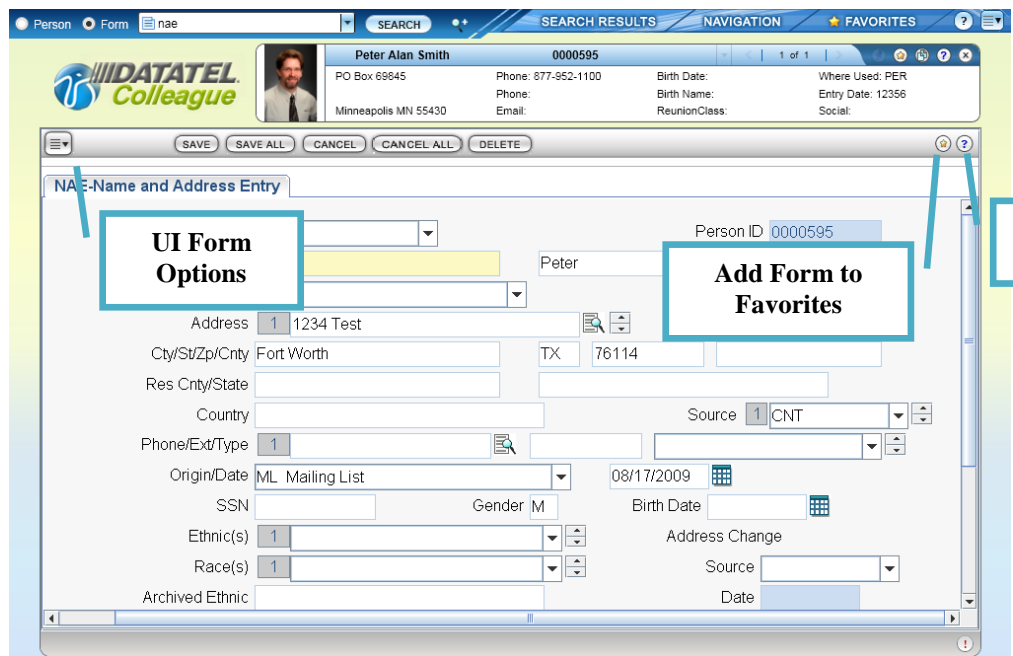
### Context Area Buttons

The Context Area contains the following buttons:

-  **Mapping:** Shows a map of address(es) in Context Area (optional)
-  **Add to Favorites:** Adds the current card or all cards to Person Favorites.
-  **Launch Copy Window:** Launches a new browser window with the contents of the current context card which can be copied and pasted into another application.
-  **Card Help:** Online help about the Card.
-  **Close:** Closes one or all records in the Context Area.

### UI Form

The Colleague form consists of the following components



The screenshot shows the DATATEL Colleague interface for a person named Peter Alan Smith (Person ID: 0000595). The form is titled "NAE-Name and Address Entry" and contains various input fields for personal information. Three callout boxes highlight specific UI elements:

- UI Form Options:** Points to a dropdown menu in the top left of the form area.
- Add Form to Favorites:** Points to a star icon in the top right of the form area.
- UI Form Field Help:** Points to a question mark icon in the top right of the form area.

*Continued on next page*

## Elements of the UI Window, Continued

---

### Forms and the Context Area

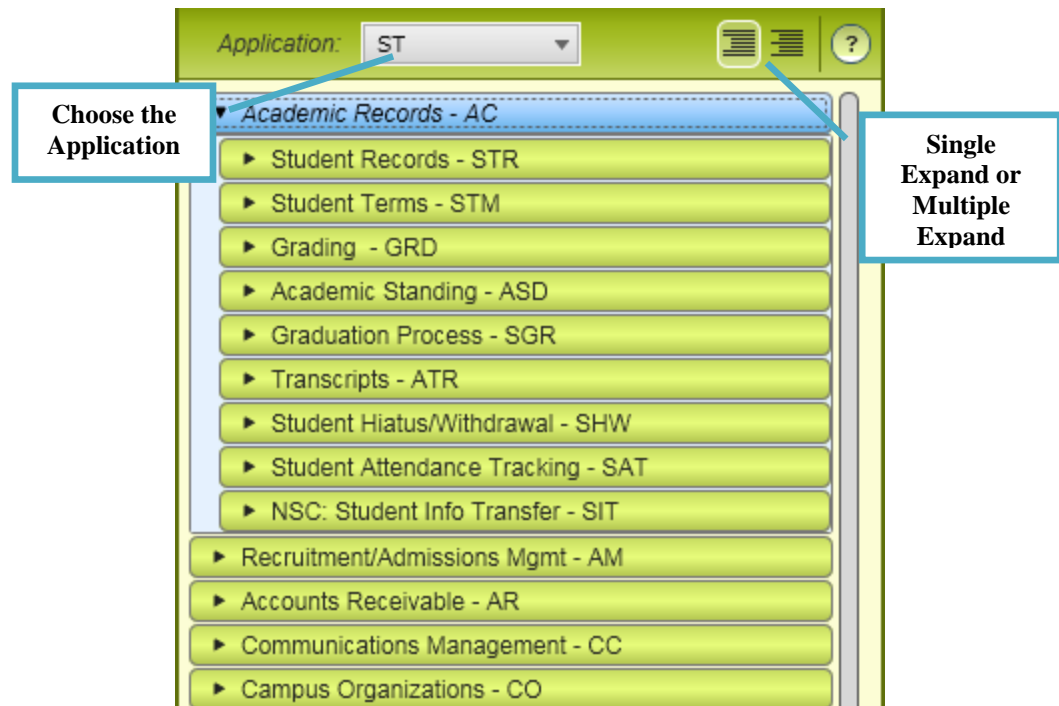
It is important to note that the UI Form will behave differently; depending whether or not there is a card in the Context Area.

- If there is no card in the Context Area, then the form will behave as it normally does in Colleague. That is, it will display the standard LookUp prompt(s).
  - If there is a card in the Context Area, and the type of record matches the form's initial LookUp prompt, then that record will be loaded into the form. Additional LookUp prompts may appear if that is appropriate for the particular form.
  - If there is a card in the Context Area, but the type of record does not match the form's initial LookUp prompt, then the form will behave as it ordinarily does in Colleague. That is, it will display its standard LookUp prompt(s).
- 

### Navigation Panel

It is not necessary to access a form before accessing a person in UI 4, as in previous versions but Colleague still provides the traditional menu structure within the Navigation Panel. This is accessible by clicking the Navigation tab.

The Navigation Panel consists of the following components





# Search Capabilities


## Person Search

**Introduction** Rather than selecting a Colleague form first, and then selecting the person or organization, UI 4 allows you to select the person(s) or organization(s) first, and then choose the Colleague form.


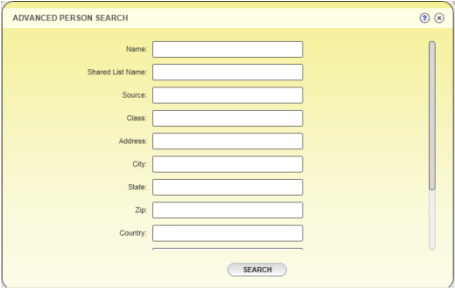
The Search Area is used to:

- Choose the type of search to perform ( Person/Organization or Form)
- Enter the search criteria (name, partial name, SSN, Colleague ID, etc.)
- Access the **Advanced Person Search** feature.

**Procedure for Person Search** Follow the procedure below to perform a person search.

Step	Action
1	In the Search Area, select <b>Person</b> . 
2	Enter your person search criteria, such as the person's name or Colleague ID, in the search box.
3	Click <b>Search</b> or press [Enter].

**Procedure for Advanced Person Search** Follow the procedure below to perform an advanced person search.

Step	Action
1	In the Search Area, click the Advanced Search icon. 
2	In the Advanced Person Search dialog box, enter your search criteria. 
3	Click <b>Submit</b> .

*Continued on next page*

# Person Search, Continued

## Search Results Panel Views

Search results are displayed on the Search Results Panel. Each record is identified with a sequence number that may be selected using the **Select #** field at the bottom of the panel.

### Search Results Options



### Card View

**Search Results for: smith**

Filter: Combined | Select All | 1 - 8 of 12

#	Name	ID	Social	Address Line	Address CSZ	Source	Where Used
1	Jamie Brown-Smith	0001318	387-24-8379	4365 Big Horn Wy Cheyenne WY 82001		ALU	CON, PAC, PE...
2	Christopher J Smith	0000301	236-01-0004	7822 Live Oak Blvd Wayne PA 19019		STU	APP, MAI, PER...
3	Joe Smith	9000096					PER
4	Joe Smith	9000097					
5	Joseph Smith	0001294					

**Search Criteria** (points to the search bar)

**# of Results** (points to '1 - 8 of 12')

**Add New Record** (points to the '+ person icon' button)

(Only available when using the LookUp prompt and permissions allow)

### Grid View

**Search Results for: smith**

Filter: Combined | Select All | 1 - 12 of 12

#	Name	ID	Social	Address Line	Address CSZ	Source	Where Used
1	Jamie Brown-Smith	0001318	387-24-8379	4365 Big Horn Wy	Cheyenne WY 82001	ALU	
2	Christopher J Smith	0000301	236-01-0004	7822 Live Oak Blvd	Wayne PA 19019	STU	
3	Joe Smith	9000096					
4	Joe Smith	9000097					
5	Joseph Smith	0001294					
6	M. Kristen Smith	0000036		4375 Fairlakes Ct	Fairfax VA 22033	STA	
7	Mike Smith	0000650					
8	Peter Alan Smith	0000595		PO Box 69845	Minneapolis MN 55430	CNT	
9	The Dude Smithbillz	0000302	236-01-0019	14424 Metric Blvd	Austin TX 78727, UNITED STATES	ALU	
10	Sally Smithen	0000336		4542 Oak St	Wayne PA 19019	SPO	
11	Frank Smithson	0001273		9917 Friend Ave	Helena MT 59601	ALU	
12	Robert Smithson	0000309		203 Halifax Rd.	Shaker Heights OH 44135	ALU	

**Click on Column Headers to Sort Results** (points to the column headers)

Continued on next page

## Person Search, Continued

---

### Card View vs. Grid View

Comparison of Card View and Grid View		
Feature	Card View	Grid View
<b>Photos</b>	Displays photos of people (if available)	Does not display photos
<b>Selecting multiple records</b>	Click each record	Use CTRL- or SHIFT- while clicking each record
<b>Number of records displayed per page</b>	Smaller number	Larger number
<b>Sort records</b>	Not sortable	Sort by clicking on column headers
<b>Order of columns</b>	No columns	Columns can be re-ordered by dragging them

---

# Form Search


---

## Introduction

The results for a Form search will be displayed on the Search Results panel. Unlike the Person search results, this view displays only in Grid View. It is important to note that if a mnemonic is entered, the form will immediately launch in the UI Form Area. Only one Colleague form may be launched at a time from the Search Results Panel.

---

## Procedure for Form Search

Step	Action
1	In the Search Area, select <b>Form</b> . 
2	Enter your form search criteria, such as mnemonic or title word.
3	Click <b>Search</b> or press [Enter].

---

## Search Results Panel View

### Grid View (Only View Available with Form Search)

Form Search Results for: <i>name</i>			
#	Name	Mnemonic	Application
1	Formatted Names	FNM	CORE
2	Name and Address Entry	NAE	CORE
3	Name and Address Hierarchy	NAHM	CORE
4	Name/Address Selection Params	NASP	CORE
5	T4 Modify Name and Address	T4MN	HR
6	Common App Name and Address	CNAE	ST
7	Final Grading by Name	FGRN	ST
8	Midterm Grading by Name	MGRN	ST
9	WI Name/SSN Difference Report	WIN5	ST
10	Change Registry Account Names	CRAN	UT
11	Convert Safari Table Names	CSSN	UT

---

# Favorites

## Adding and Opening Favorites

---

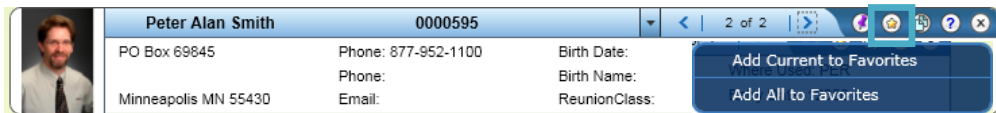
**Introduction** UI 4 allows you to define People Favorites as well as Form Favorites. People Favorites and Form Favorites are displayed in separate areas within the Favorites Panel.

---

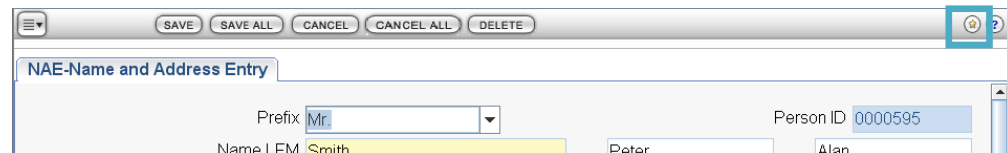
**Adding people to Favorites** People from the Context Area can be added to Favorites by using the Add to Favorites icon (yellow star) in the Context Area.

The following choices are available:

- **Add Current to Favorites.** This adds only the active person in the Context Area to Favorites.
- **Add All to Favorites.** This adds all people in the Context Area to Favorites.



**Adding forms to Favorites** A Colleague form can be added to Favorites using the Add to Favorites button (yellow star) in the upper right corner of the UI Form Area.







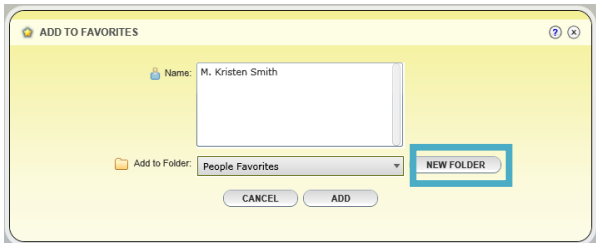
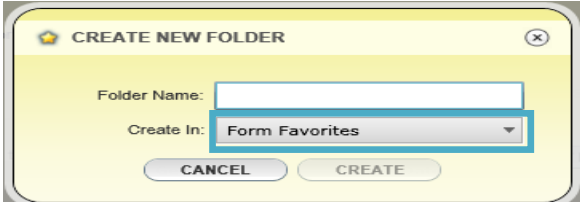


*Continued on next page*

## Adding and Opening Favorites, Continued

### Procedure for Adding People and Forms to Favorites

When adding Favorites, you will use the **Add to Favorites** dialog box to add your new Favorites into existing folders, or you may create new folders in which to add them. You may create nested Folder structures.


Step	Action						
1	<p>Determine if you would like to add a person or form to Favorites.</p> <table border="1"> <thead> <tr> <th data-bbox="553 495 846 527">If</th> <th data-bbox="846 495 1411 527">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="553 527 846 842">You are adding a Person</td> <td data-bbox="846 527 1411 842"> <ul style="list-style-type: none"> <li>• Perform a Person search and open the person record</li> <li>• In the Context Area, click the <b>Add to Favorites</b> button ,</li> <li>• Choose <b>Add Current to Favorites</b> to add the current person record to Favorites.</li> <li>• Proceed to Step 2</li> </ul> </td> </tr> <tr> <td data-bbox="553 842 846 1041">You are adding a Form</td> <td data-bbox="846 842 1411 1041"> <ul style="list-style-type: none"> <li>• Perform a Form search and open the form.</li> <li>• In the UI Form Area, click the <b>Add to Favorites</b> button </li> <li>• Proceed to Step 2</li> </ul> </td> </tr> </tbody> </table>	If	Then	You are adding a Person	<ul style="list-style-type: none"> <li>• Perform a Person search and open the person record</li> <li>• In the Context Area, click the <b>Add to Favorites</b> button ,</li> <li>• Choose <b>Add Current to Favorites</b> to add the current person record to Favorites.</li> <li>• Proceed to Step 2</li> </ul>	You are adding a Form	<ul style="list-style-type: none"> <li>• Perform a Form search and open the form.</li> <li>• In the UI Form Area, click the <b>Add to Favorites</b> button </li> <li>• Proceed to Step 2</li> </ul>
If	Then						
You are adding a Person	<ul style="list-style-type: none"> <li>• Perform a Person search and open the person record</li> <li>• In the Context Area, click the <b>Add to Favorites</b> button ,</li> <li>• Choose <b>Add Current to Favorites</b> to add the current person record to Favorites.</li> <li>• Proceed to Step 2</li> </ul>						
You are adding a Form	<ul style="list-style-type: none"> <li>• Perform a Form search and open the form.</li> <li>• In the UI Form Area, click the <b>Add to Favorites</b> button </li> <li>• Proceed to Step 2</li> </ul>						
2	<p>In the <b>Add to Favorites</b> dialog box, click <b>New Folder</b>.</p> 						
3	<p>In the <b>Create New Folder</b> dialog box, verify that the <b>Create In</b> folder is specified as the correct folder (either <i>People Favorites</i> or <i>Form Favorites</i>)</p> 						
4	<p>Enter the name you would like to use for the <b>Folder Name</b> that will be created</p>						
5	<p>Click <b>Create</b> and <b>Add</b> when prompted.</p>						

*Continued on next page*

# Adding and Opening Favorites, Continued

## Procedure for Opening Favorites

Follow the procedure below to select and open favorites

Step	Action								
1	<p>Click on the Favorites Tab</p> 								
2	<p>Determine what you would like to open</p> <table border="1" data-bbox="553 1045 1390 1560"> <thead> <tr> <th data-bbox="553 1045 857 1119">If you would like to open ...</th> <th data-bbox="857 1045 1390 1119">Then ...</th> </tr> </thead> <tbody> <tr> <td data-bbox="553 1119 857 1192">A single Person or Form</td> <td data-bbox="857 1119 1390 1192">Click on the Person or Form</td> </tr> <tr> <td data-bbox="553 1192 857 1266">A folder of people</td> <td data-bbox="857 1192 1390 1266">Click the triangle to the right of the folder name.</td> </tr> <tr> <td data-bbox="553 1266 857 1560">Multiple people</td> <td data-bbox="857 1266 1390 1560">           Press <b>SHIFT</b> and click the mouse to select people in sequence            OR            Press <b>CTRL</b> and click the mouse to select people in sequential order.   <i>Note: You can select more than one person but only one form.</i> </td> </tr> </tbody> </table> <p data-bbox="553 1602 1390 1736"><i>Note: You can select multiple people from the People section and a specific form from the Forms section at the same time. The form will load into the UI Form Area and the people will load into the Context area at the same time.</i></p>	If you would like to open ...	Then ...	A single Person or Form	Click on the Person or Form	A folder of people	Click the triangle to the right of the folder name.	Multiple people	Press <b>SHIFT</b> and click the mouse to select people in sequence OR Press <b>CTRL</b> and click the mouse to select people in sequential order.  <i>Note: You can select more than one person but only one form.</i>
If you would like to open ...	Then ...								
A single Person or Form	Click on the Person or Form								
A folder of people	Click the triangle to the right of the folder name.								
Multiple people	Press <b>SHIFT</b> and click the mouse to select people in sequence OR Press <b>CTRL</b> and click the mouse to select people in sequential order.  <i>Note: You can select more than one person but only one form.</i>								

Continued on next page

## Adding and Opening Favorites, Continued

---

**Procedure for  
Opening  
Favorites**  
(continued)

Step	Action
3	Select <b>Open</b>  <i>Note: When selecting people and a form together, person information is loaded into the form only if the form uses the person record as the primary LookUp. Otherwise, the selected people are loaded into the Context Area but not used until you open a form that uses the person record as the primary LookUp.</i>

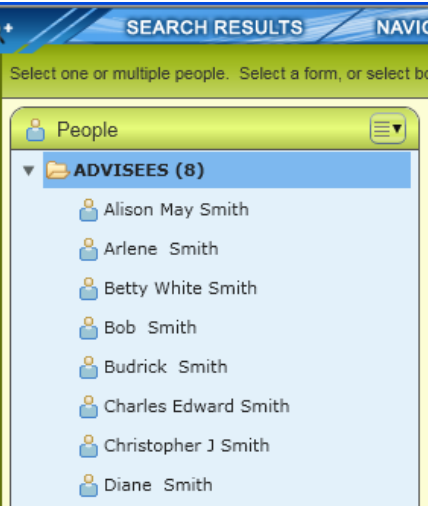
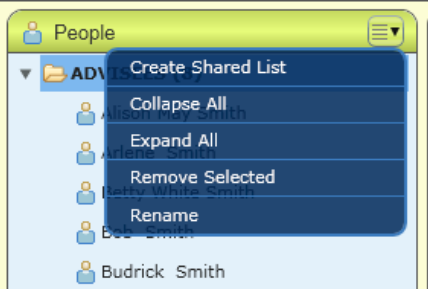
---



# Creating a Shared List

**Introduction** You can create a Shared List of people records that you can share with co-workers. This list is stored as a saved list in Colleague.

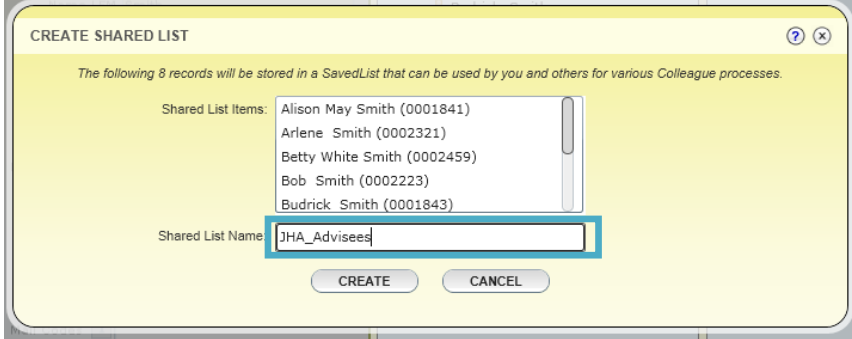
**Procedure for Creating a Shared List** Follow the procedure below to create a shared list of people records.

Step	Action
1	Click on the <b>Favorites</b> tab.
2	Select one or more people or a folder of people from your Favorites. 
3	Click <b>Create Shared List</b> . 

*Continued on next page*

## Creating a Shared List, Continued

### Procedure for Creating a Shared List (continued)

Step	Action
4	<p data-bbox="548 331 1292 365">Enter the name of your shared list in the Share List Name.</p> <div data-bbox="553 380 1401 716"><p data-bbox="581 405 1333 459">CREATE SHARED LIST</p><p data-bbox="630 443 1333 459">The following 8 records will be stored in a SavedList that can be used by you and others for various Colleague processes.</p><p data-bbox="711 478 1024 590">Shared List Items: Alison May Smith (0001841) Arlene Smith (0002321) Betty White Smith (0002459) Bob Smith (0002223) Budrick Smith (0001843)</p><p data-bbox="711 604 922 621">Shared List Name: JHA_Advisees</p><p data-bbox="862 646 1097 663">CREATE CANCEL</p></div> <p data-bbox="548 772 1390 911"><i>Note: You will want to follow your institution's naming conventions when saving the shared list. If you enter a shared list name that already exists, you will be asked if you want to overwrite it.</i></p>
5	Click <b>Create</b> .

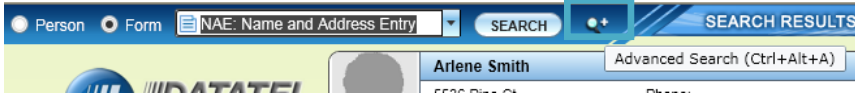
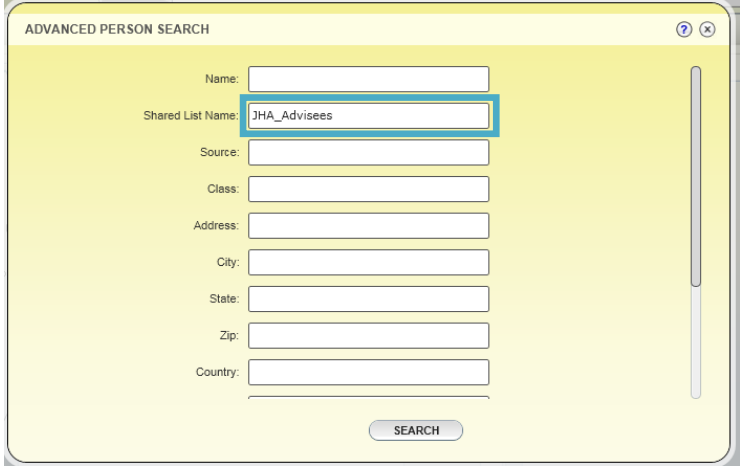
# Using a Shared List

## Introduction

You can use an existing shared list to access individuals or a group of individuals from your Favorites.

## Procedure for Using a Shared List

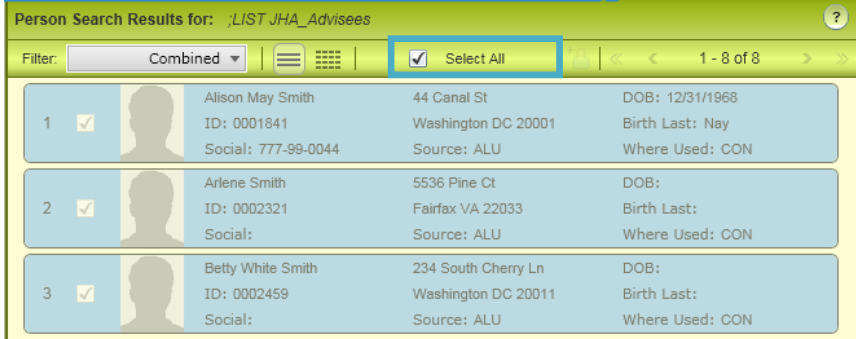
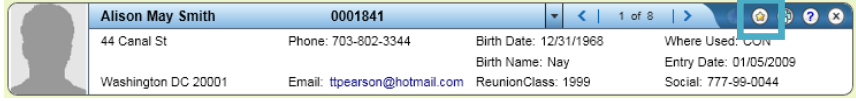
Follow the procedure below to use a shared list.

Step	Action
1	<p>Click on the <b>Advanced Person Search</b> button.</p> 
2	<p>On the <b>Advanced Person Search</b> dialog box, enter the name of the shared list you want to use in the <b>Shared List Name</b> field.</p> 
3	<p>Click <b>Search</b>. The records from the shared list are loaded as person search results.</p> <p><i>Note: To create your own list of these people in your Favorites, make sure that your Context Area is clear (no people loaded into it). If necessary, collapse the Person Search Results panel to get to the Context Area and close out any records in it.</i></p>

Continued on next page

## Using a Shared List, Continued

### Procedure for Using a Shared List (continued)

Step	Action
4	<p>From the Person Search Results panel, click <b>Select All</b> and <b>Open</b> to load all results into the Context Area. You can begin working with the records right away.</p> 
5	<p>To save a copy of the shared list, click the <b>Add to Favorites</b> (gold star) button in the Context Area to save all of the records to your favorites. Use a folder to keep this list organized.</p>  <p><i>Note: When you use an existing Shared List and add it to your Favorites as described above, it creates a new copy of the list in your Favorites. If the original Shared List changes, or if you make changes to the list that you saved in your Favorites, the lists will no longer be identical.</i></p>

# Additional Features

## Preferences

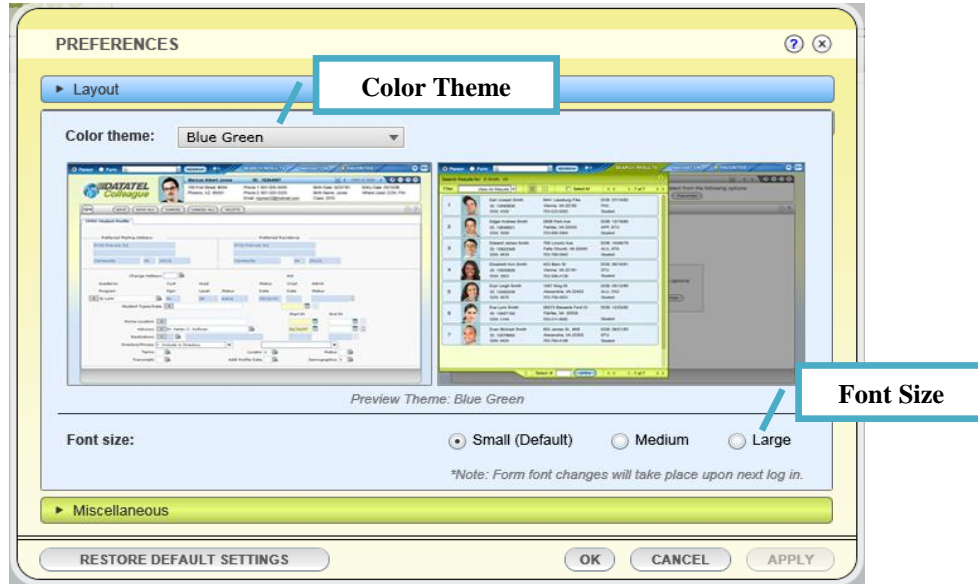
---

**Introduction** The UI 4 preferences can be accessed using the drop-down menu in the upper right corner of the UI Window.

---

### Options Available in Preferences

#### Layout



*Continued on next page*

## Preferences, Continued

Options  
Available in  
Preferences,  
cont.

### Miscellaneous

The screenshot shows the 'Miscellaneous' section of the 'PREFERENCES' dialog box. It contains the following settings:

- Display Person Photos:** Radio buttons for 'Yes' and 'No'. A callout box labeled 'Photos on/off' points to the 'No' button.
- Context Area Drop Menu Sort:** Radio buttons for 'Alphabetical (Default)' and 'Same as Context Area'. A callout box labeled 'Sort Order of Card Selector in Context Area' points to the 'Same as Context Area' button.
- Default Number of Search Results:** Two dropdown menus. The first is set to '8' and is labeled 'Card View'. The second is set to '16' and is labeled 'Grid View'. A callout box labeled 'Number of Search Results Displayed in Search Results Panel' points to the '16' dropdown. A note below reads: '\*Note: Default = 8 Card View, 16 Grid View'.

At the bottom of the dialog are buttons for 'RESTORE DEFAULT SETTINGS', 'OK', 'CANCEL', and 'APPLY'.

*Note: The Display Person Photos option is only available if photos have been enabled by your administrator. If you do not have photos enabled, you will not have the option of turning them on in this dialog box.*

## FAQs

---

**How do users access application-specific forms in UI 4.0? For example, how do I access the valcodes for CORE? Is it different from the methodology of UI Desktop and UI Web?**

The methodology is different.

Some forms in Colleague will populate specific files in the database based on which Colleague application you are in. For example, the VAL form is defined as a UT form but is used throughout Colleague to populate Valcode tables. The Envision files naming convention is <appl>.VALCODES.

To access CORE valcodes in UI Desktop or UI Web, you need to be in the CORE application and then execute VAL manually from the Quick Access box.

In UI 4.0, you need to specify the application as part of the FORM search. So, if you want to access CORE valcodes, you must enter CORE-VAL (<appl>-<form>) in the FORM search.

**Can I access the Toolkit from UI 4.0? Will I be able to in the future?**

**The Toolkit is NOT ACCESSIBLE from UI 4.0.** If you attempt to access ANY toolkit form in UI 4.0 you will receive the message: “Sorry, no forms matched the provided criteria.” If you search on TOOL-<form mnemonic> (i.e. TOOL-CPKG), you will receive the message: “TOOL forms cannot be launched from UI 4.0”.

But there are some Release System tasks that are not in Studio and for the time being will remain Envision processes. These are forms used with Colleague Studio to view and manage customizations to Colleague.

**These forms will be migrated to UT, with a target date of Q1, 2010.** The forms will retain their mnemonics, so that as they move, they will appear the same and be available from UI 4.0.

---