

**Datatel Colleague®**

# ***Guide to User Interface 4.3***

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For corrections and clarifications to this manual, see [AnswerNet page 1926.37](#).



## ***Guide to User Interface 4.3***

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# Table of Contents

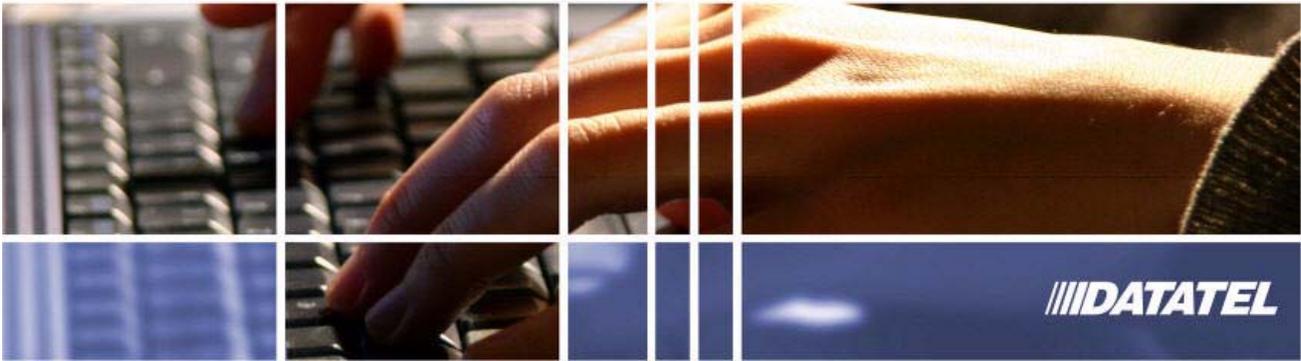
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<b>7</b>	<b>User Interface 4.3</b>
<b>9</b>	<b>About UI 4.3</b>
9	In This Chapter
10	What's New in UI 4.3
11	Features in UI 4.2 and Later Versions
11	Window Resizing and Form Scaling
11	Search Field
12	LookUp Search Results
12	Features in Colleague Forms
12	Right-Click for Cut, Copy, and Paste
13	Table Controller
13	Background Toggle Button
13	Export to Excel
13	Print Form Button
14	Form Background Color
15	Comments Dialog Box
15	Report Browser
16	Map Window
16	Expanded View of All People in Context
17	Query Builder is Not Accessible From UI
17	AnswerNet Change Requests Resolved With UI 4.3
<b>19</b>	<b>Logging Into UI 4.3</b>
19	In This Chapter
20	Procedure for Logging Into Colleague with UI 4.3
<b>23</b>	<b>Navigating UI 4.3</b>
23	In This Chapter
24	The UI 4.3 Window
25	Parts of the UI 4.3 Window
25	Search Area
26	Tabs
27	Menus
29	The Context Area
31	The Form Area
33	Colleague Forms in UI 4.3
33	Form Mnemonic and Name
33	Fields
34	Tables

36	Detail Button
36	Date/Calendar Button
37	Drop-Down List Button
38	Accessing Forms and Information
38	Person Search
38	Person Search Results Panel: Card View
42	Person Search Results Panel: Grid View
45	Advanced Person Search
47	Form Search
48	Selecting a Form
48	Opening a Form
48	Sorting Results
49	Navigation Panel
51	Favorites Panel
51	Adding a Person or Form to Favorites
52	Selecting People from Favorites
52	Selecting a Form from Favorites
53	Selecting People and Forms Together from Favorites
53	Managing Favorites
55	LookUp
56	Using LookUp to Find Records
56	LookUp Shortcuts
63	Adding Records from a LookUp
64	Uploading and Downloading Files
64	Uploading Files to Colleague
66	Downloading Files from Colleague
68	Running Batch and Report Processes
69	Using the Report Browser
69	Procedure for Browsing a Report
75	Accessing Multiple Environments
76	Keyboard Shortcuts
79	Using UI 4.3 Without a Mouse
80	Viewing Online Help in UI 4.3
<b>83</b>	<b>Customizing UI 4.3</b>
83	In This Chapter
84	Defining User Preferences
86	Adding and Accessing Favorites
86	Adding Favorites
87	Accessing Favorites
92	Customizing the Field Sequence and Properties for a Form
94	Limitations on Customizing Field Properties
94	Field Sequence Customization Limitations

95	Field Access Customization Limitations
95	Procedure for Customizing Fields on a Form
97	Procedure for Disabling Field Sequence
98	Procedure for Showing Field Sequence





## Guide to User Interface 4.3

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# User Interface 4.3



# About UI 4.3

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## In This Chapter

This chapter summarizes the enhancements made to UI 4.3 and includes highlights of special features in UI 4.2 and later versions.

## What's New in UI 4.3

UI 4.3 offers the following enhancements:

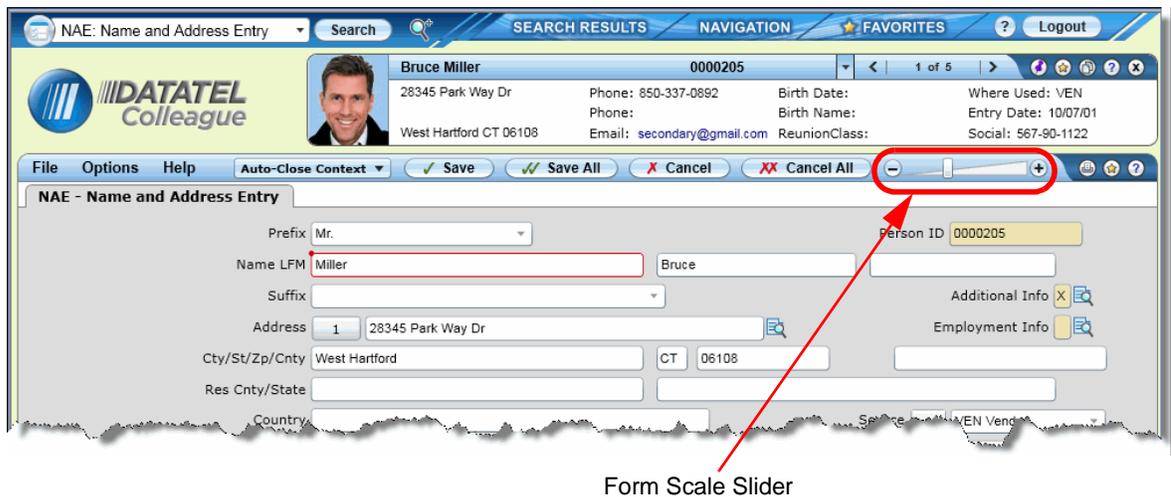
1. **Context option.** You can use an option to automatically close context when finishing out of a form.
2. **Export to Excel.** You can export to Microsoft Excel from the Search Results panel. Additionally, improvements to the formatting of the resulting spreadsheets include a frozen header, correct assignment of numbers and dates, and support for special characters.
3. **Export reports to PDF.** You can export Colleague reports to a PDF file format in the Report Browser.
4. **History drop-down.** There is an improved Form history and Person history drop-down.
5. **View Shared Lists.** You can view recently created Shared Lists from the Advanced Search and Create Shared List windows.
6. **ImageNow.** There is improved support for ImageNow.
7. **Open multiple-application forms.** A window prompt makes it easier to open forms that are accessible and function differently in separate applications, such as the Validation Codes (VAL) form.
8. **Custom Field Sequence & Properties.** Updates to the custom tabbing functionality make it easier to customize user-specific field settings.
9. **Add to Favorites while in the Favorites panel.** You can add active people or forms to your Favorites while in the Favorites panel.

# Features in UI 4.2 and Later Versions

## Window Resizing and Form Scaling

When Colleague displays a form, it automatically resizes to minimize scrolling for the default window size. You can also move the form scale slider (see [Figure 1](#)) to resize the current form and make the information larger or smaller as needed. Colleague will remember the setting the next time you open that form. Go to the **Options** menu to manually set the scale for all your forms at once.

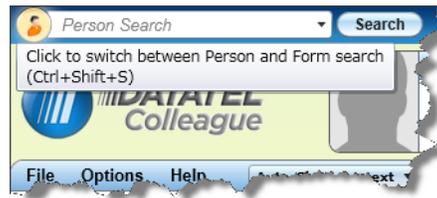
Figure 1: UI Form Scale Slider



## Search Field

The Search field uses icons and text prompts (see [Figure 2](#)) to switch between Person Search and Form Search. You can click the icon to the left of the search text box to switch between searching for a person (human figure icon) or a form (computer screen icon).

Figure 2: UI Search Field



## LookUp Search Results

The **Search Results** panel (see Figure 3) allows the flexibility to view things like purchase orders or code files in a grid view, and sort on any column of data that is displayed.

Figure 3: UI LookUp Search Results



## Features in Colleague Forms

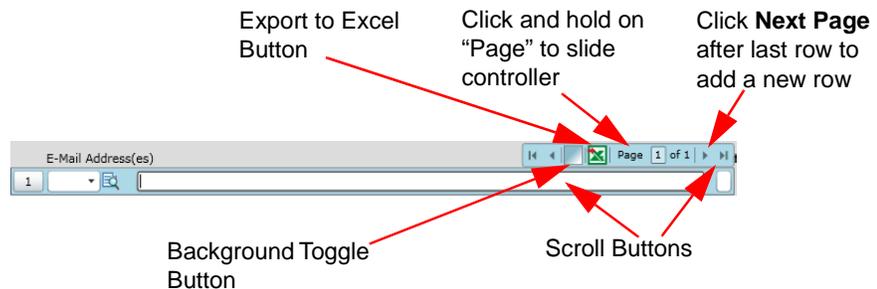
### Right-Click for Cut, Copy, and Paste

You can cut, copy, or paste text in any field on a UI form. Select the text and right-click to access these options, or use the standard keyboard shortcuts (Ctrl+X, Ctrl+C, and Ctrl+V).

## Table Controller

Whenever a field is in focus within a table on a UI form (where the fields are organized in rows and columns), you can “page down” to see more rows. A table controller is provided (see [Figure 4](#)) to make moving around and viewing the rows and pages of data easier.

**Figure 4:** UI Table Controller



## Background Toggle Button

When the table controller appears on a UI form, you can toggle between regular and transparent table backgrounds. (see [Figure 4](#)).

## Export to Excel

When the table controller appears on a UI form, you can select the **Export to Excel** button to export all rows of data to a spreadsheet (see [Figure 4](#)).

## Print Form Button

The form area includes a **Print Form** button (see [Figure 5](#)), which allows you to directly print the current form along with the Person in context associated with the form.

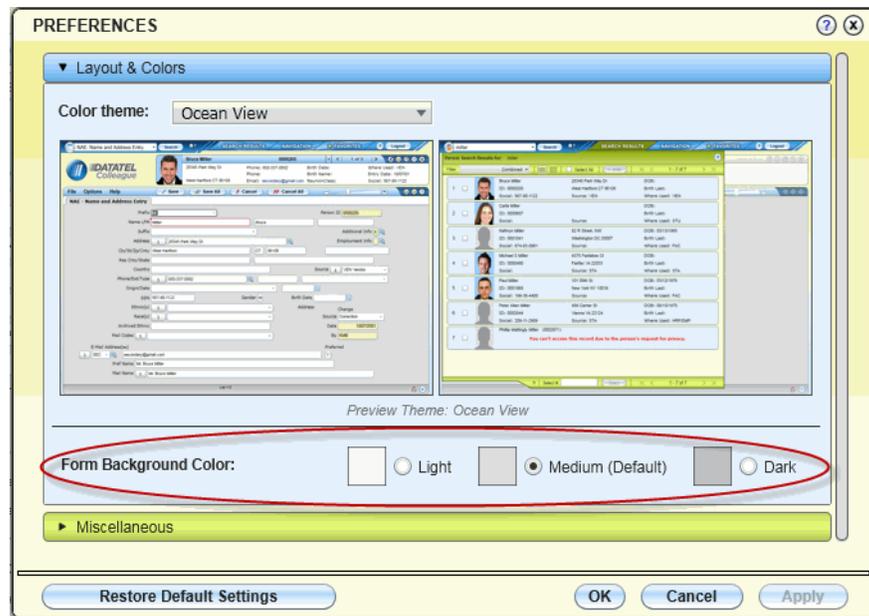
Figure 5: UI 4.3 Form Print Button



## Form Background Color

From the **Preferences** dialog box, each user can select one of the available form background colors (light, medium, or dark) to adjust the contrast between the background of a Colleague form and the text fields (see [Figure 6](#)).

Figure 6: Form Background Color Preference Setting



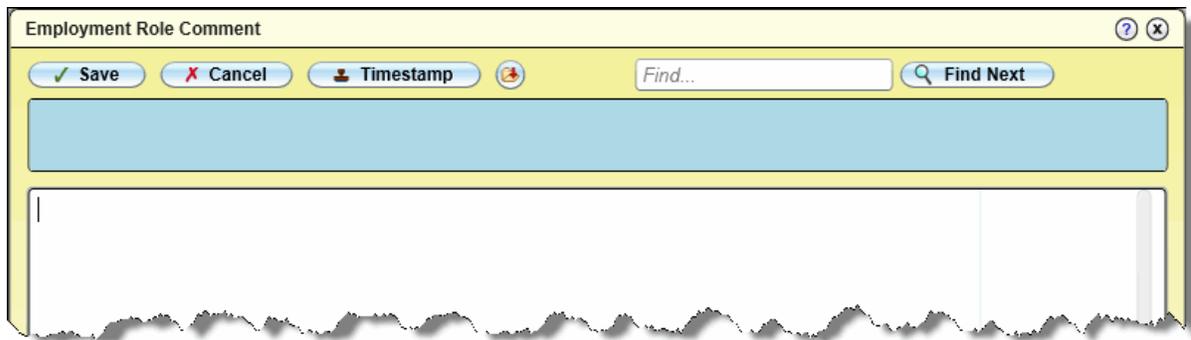
## Comments Dialog Box

A pop-up **Comments** dialog box (see [Figure 7](#)) displays messages for some forms. If you are allowed to create or edit comments in the dialog box, you can easily insert a date/time/login ID stamp into the comments using the **Timestamp** button.



**Note:** You can also enter the pound sign (#) followed by **Enter** to insert a date/time/login ID stamp.

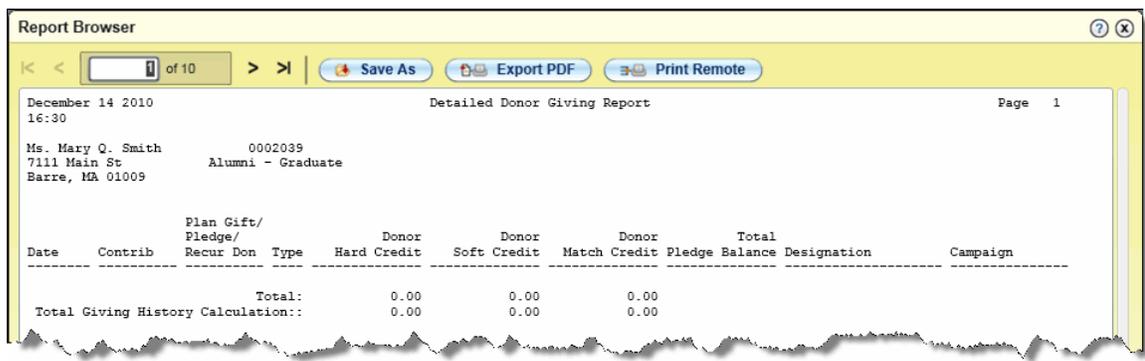
**Figure 7:** UI Comments Dialog Box



## Report Browser

UI provides a report browser with export to PDF or print options (see [Figure 8](#)).

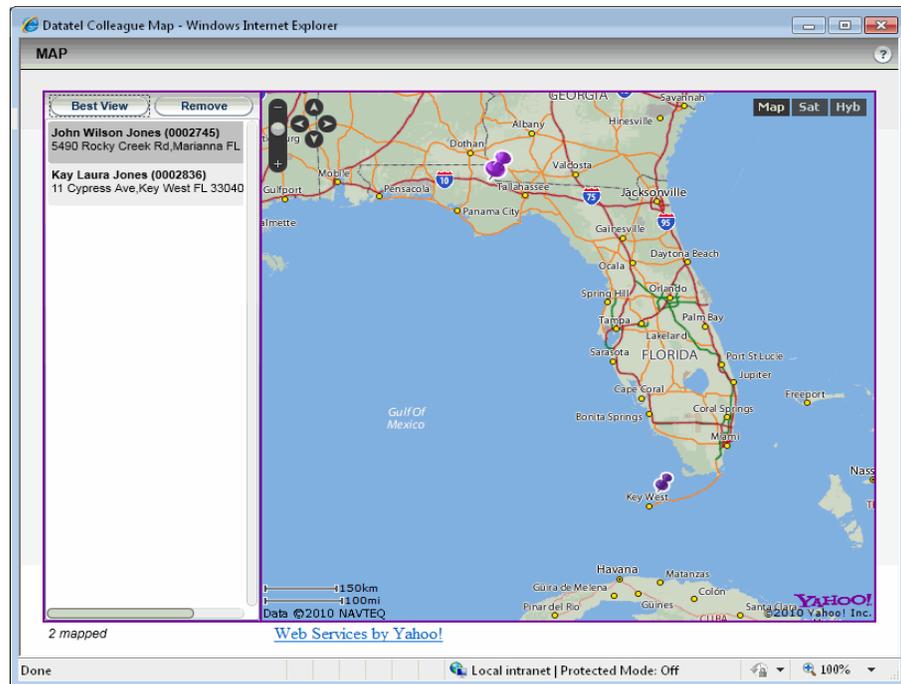
**Figure 8:** UI 4.3 Report Browser



## Map Window

If allowed by your institution, a map window is provided (see [Figure 9](#)).

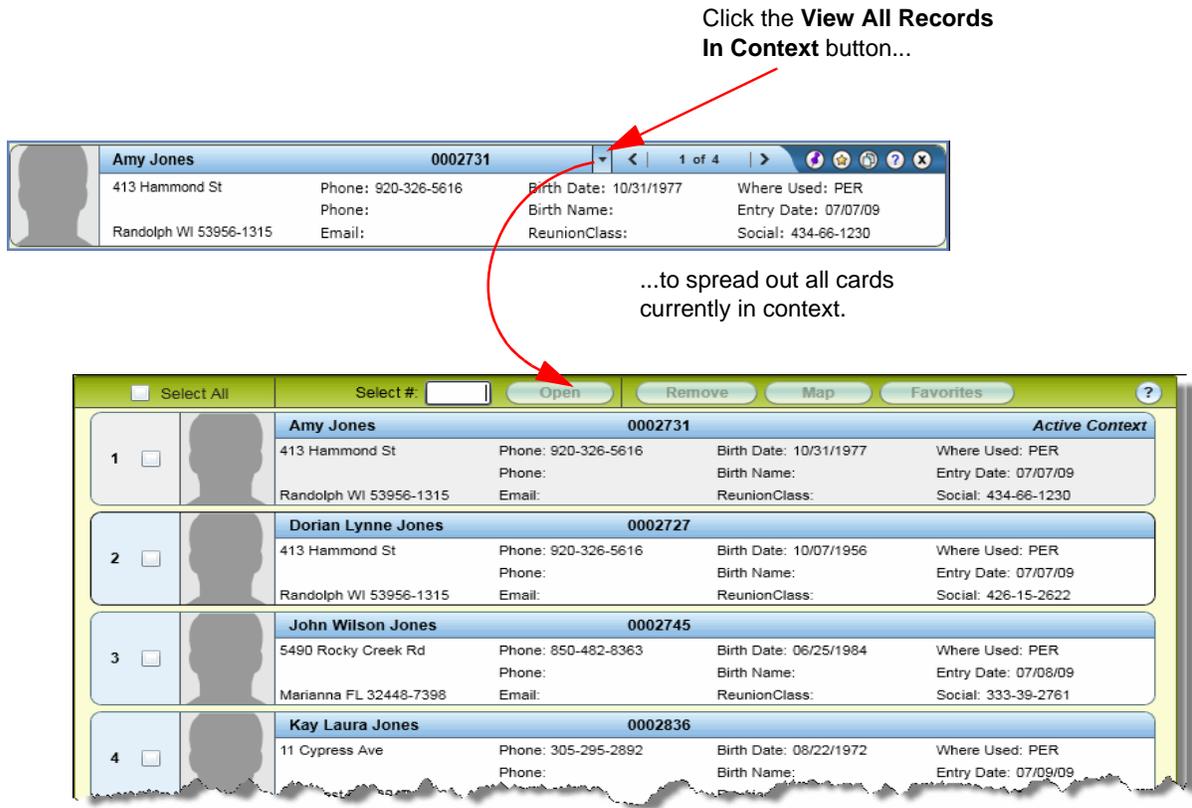
**Figure 9:** UI Map Window



## Expanded View of All People in Context

The **View All Records in Context** button provides an expanded card view, spreading out the cards so you can view or select several at one time. From this view, you can select one or several people to map, save as Favorites, or remove from context.

Figure 10: View All Records in Context



## Query Builder is Not Accessible From UI

Query Builder, a wIntegrate utility, is not accessible from UI in UI 4.2 or later. If you normally use Query Builder to do your work, see your Colleague System Administrator for details on how to continue using this utility.

## AnswerNet Change Requests Resolved With UI 4.3

Many AnswerNet change requests were resolved with the release of UI 4.3. See your Colleague System Administrator if you need more details about the change requests that were resolved with this release.



# Logging Into UI 4.3

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## In This Chapter

This chapter provides you with information about accessing and logging into User Interface 4.3.

# Procedure for Logging Into Colleague with UI 4.3

Complete the following steps to log into Colleague with UI 4.3. Your system administrator will provide you with a web address (URL) for accessing a specific Colleague environment (such as test or production) with UI 4.3. Each Colleague environment has its own web address for starting UI 4.3. If you are using the Datatel Portal, you can access Colleague with UI 4.3 from the Portal page.



**Note:** For Unix systems, the login dialog box will include an option for changing your password if your Colleague System Administrator has enabled this feature.

**Step 1.** Start UI 4.3 on your PC by opening your web browser and going to the web address provided by your Colleague system administrator.

The **Login** dialog box is displayed.

**Figure 11:** Login Dialog Box

Change Password link appears only if enabled, for Unix systems only



**Step 2.** Enter your Colleague user ID and password.

**Step 3.** Click **Login**.

The Quick Tour window appears, providing you with the option to view a presentation about the main features available in UI 4.3.



**Technical Tip:** Select the **Don't Show Me Again** check box if you do not want the Quick Tour window to appear each time you log in. You can access the Quick Tour at any time from the **Help** menu.

**Step 4.** Click the **Play** arrow if you want to view the Quick Tour presentation.

Click **Close** if you want to open Colleague in UI 4.3 without viewing the Quick Tour.



# Navigating UI 4.3

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## In This Chapter

This chapter helps you learn how to use UI 4.3. It includes instructions for accomplishing various tasks, such as accessing a form, saving your work, and using online help.



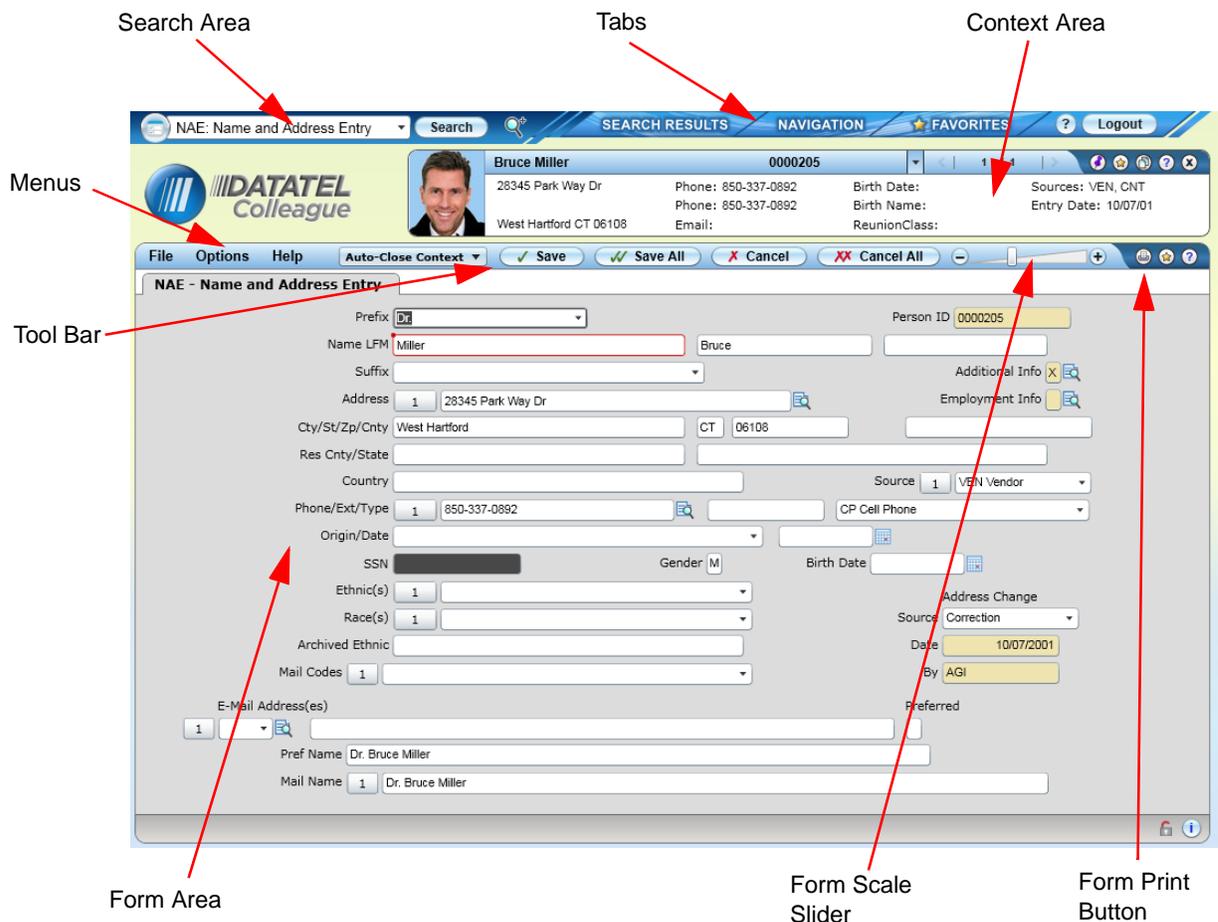
**Technical Tip:** If you are familiar with earlier versions of UI, see [“About UI 4.3” beginning on page 9](#) for information about the features and enhancements in UI 4.3.

# The UI 4.3 Window

UI 4.3 is a user-friendly, intuitive interface for Colleague.

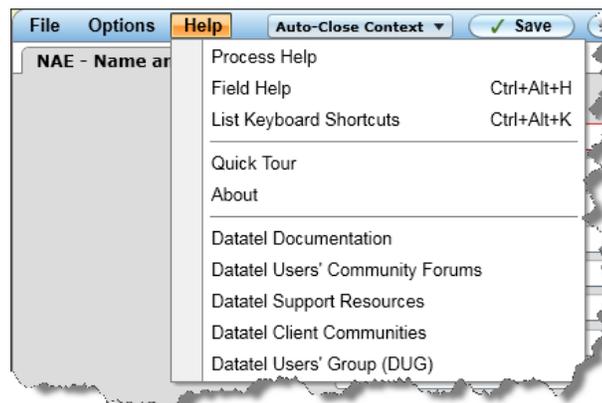
If you are familiar with Colleague in the UI Desktop or UI Web interfaces, you may notice that this interface is very similar, but with some features not previously available. See [Figure 12](#) for an example of the UI 4.3 interface. See “[Parts of the UI 4.3 Window](#)” beginning on [page 25](#) for more details about each of the areas of the UI 4.3 window.

**Figure 12:** The UI 4.3 Window



The UI 4.3 Quick Tour provides a brief overview of many of the UI 4.3 features. To access the quick tour, select the **Quick Tour** option from the **Help** menu (see [Figure 13](#)).

Figure 13: The Help Menu



## Parts of the UI 4.3 Window

The UI 4.3 window has the following areas to help you work with Colleague easily and effectively.

### Search Area

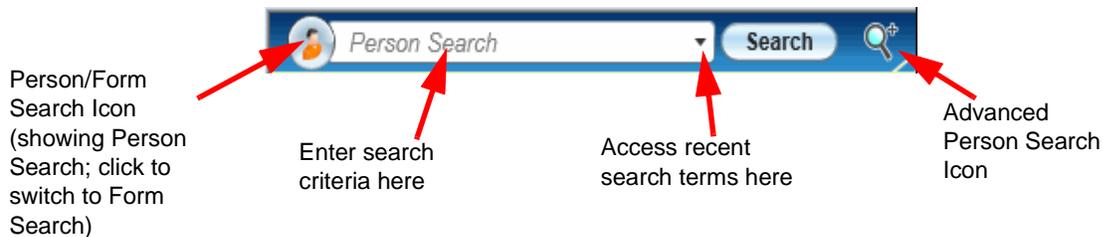
The search area of the UI window, in the upper left corner (see [Figure 14](#)), lets you search for people or forms to work with. You can click the icon to the left of the search text box to switch between searching for a person (human figure icon) or a form (computer screen icon). In this area, you can also expand the search box to view previous searches or click **Edit Search History** to clear some or all of your search history.

If allowed by your institution, you can search for a person or organization by clicking the **Person** icon and then entering information such as the name or ID number in the search box. You can also click the **Advanced Person Search** icon (magnifying glass icon to the right of the **Search** button) to search for person-related records using multiple customizable search parameters, such as part of the address and class standing. For either search option, the **Search Results** panel displays all person records that match the search criteria you entered. See [“Person Search” on page 38](#) for more details.

To search for a form, type the mnemonic or words from the title of the form in the search box. In most cases, when you enter the mnemonic for a form in the search box, the form opens immediately. When you enter one or more words from the title of the form, the **Search Results** panel displays all matching

forms. See “[Form Search](#)” on page 47 for more details. To immediately open a specific application/mnemonic pair, enter your search as application-mnemonic, such as CORE-NAE. Forms opened in this way are not stored in your search history. Also, forms that require an explicit selection of the application to open will prompt you for the application when loading.

**Figure 14: The Search Area**



## Tabs

Figure 15 shows the following tabs available in the UI 4.3 window:

- **Search Results Tab.** When you search for a person or form, the search results appear on the **Search Results** panel. Search results from other LookUps are also displayed on the **Search Results** panel. This panel is hidden after you select the records or form you want. When the panel is hidden, you can click the **Search Results** tab to return to the results of the last search. If the person icon is selected in the search area, the last person-related search results are shown. If the form icon is selected in the search area, the last form search results are shown.



**Note:** The **Search Results** panel only retains the results of the most recent form search or person search performed from the Search Area. Prior search results from LookUp prompts on UI forms are not retained on the **Search Results** panel.

- **Navigation Tab.** Click the **Navigation** tab to access a Colleague form by navigating through the Colleague menu structure, which you can use to view and access all menus and forms that you have permission to use. Use the Application drop-down menu to view the menu structure for any available application.
- **Favorites Tab.** Click the **Favorites** tab to access all people and forms that you have saved as Favorites. You can save an item to Favorites by clicking the **Add to Favorites** (gold star) button in the Context Area (for person-

related records), the UI Form Area (for forms), or while in the **Favorites** panel.

**Figure 15:** Tabs in the UI 4.3 Window



## Menus

With UI 4.3, menu items are available on the left side of the tool bar (which is just above the form area). These menus provide access to many of the UI controls and features.

### *File Menu*

The **File** menu provides access to the following features. Many of these features are also available using keyboard shortcuts:

- **Save.** Saves data on the current form.
- **Save All.** Saves data on all open forms.
- **Cancel.** Cancels changes on the current form.
- **Cancel All.** Cancels changes on all open forms.
- **Record Delete** (if enabled). Deletes the record on the current form. Your Colleague System Administrator controls access to this feature.
- **Detail.** Accesses the detail form (or menu of available forms) from the current field.
- **Add Active Form to Favorites.** Adds the current form to Favorites.
- **Print Form.** Prints the current form (size is optimized for the page).
- **Logout.** Exits UI 4.3.

### *Options Menu*

The **Options** menu provides access to the following features. Many of these features are also available using keyboard shortcuts:

- **Preferences.** Accesses the **Preferences** dialog box, where you can change preferences such as the color theme, font size, and other settings.
- **Clear Search History.** Accesses the **Clear History** dialog box, where you can clear search history, contexts, and form scale values. See the online help for the **Clear History** dialog box for more details about this feature.
- **Reload Colleague Session.** This option lets you refresh your session with software updates that may have been made or loaded into the environment while you were logged in. This feature is used primarily in Colleague development environments.
- **Change Password** (if available). Allows you to change your password.
- **Show Field Sequence.** Shows the current tab sequence for fields on the current form.
- **Disable Custom Field Sequence** (if available). Restores the default tab sequence for fields on the current form. If selected, this option applies to all forms in a UI session until this option is cleared.
- **Customize Field Properties** (if available). For the current form, allows the user to customize the default tab sequence for fields and mark fields as required. See the online help for the **Customize Field Sequence & Properties** dialog box for more details about this feature.
- **Set Form Scale Default.** Sets the global default scale factor for all forms to the current scale factor (set using the slider bar at the top of the UI form area). Forms with individual scale factor overrides are not affected by this global default.
- **Clear All Form Scale Values.** Clears all individual form scale factors and the global default scale factor. Without these scale values, forms are rendered using a “best fit” algorithm based on the size of the UI window.

### *Help Menu*

The **Help** menu (shown in [Figure 13 on page 25](#)) provides access to process and field help for the current Colleague form. It also provides access to the quick tour, a list of all keyboard shortcuts, and a Help About message that provides information such as the current UI version number. Your Colleague System Administrator can also add custom menu items to this **Help** menu to provide easy access to procedures and other information that is specific to your institution.

In addition to the **Help** menu, help buttons are available in many areas of the UI window. The help buttons look like question marks, and they usually appear in the upper right corner of a specific area, panel, or dialog box. These help buttons provide information specific to the related feature. For example, the help button in the top right corner of the UI window provides an overview of the UI 4.3 interface and its features. The help button in the Context Area provides specific information about using the features of the Context Area, and the help button on the **Favorites** panel provides specific information about working with Favorites.



**Technical Tip:** Depending on your browser settings, online help may appear in a new browser window each time you access help, or it may re-use the same browser window to display all help messages. If your browser re-uses the same window for all help messages, that window may not always come to the foreground when you access help.

Information on how to customize this menu is available in the [User Interface 4.3 Installation and Administration](#) manual.

## The Context Area

The Context Area (see [Figure 16 on page 31](#)) displays one or more “cards,” which contain information about the current person-related records that you are working with. The information shown in the Context Area cards can be customized at your site. If you have questions or would like to propose changes in what is shown in the Context Area, contact your Colleague System Administrator. The Context Area currently displays information only for person-related forms.

If the Context Area is blank, use the Person search feature to select Person or Organization records to work with. When you open the selected records, they are loaded into the Context Area as “cards.” If you have opened a person-related form first (with no cards in the Context Area), you can use LookUp to search for records and load them into the Context Area as cards.

Person Cards can include photographs (if set up by your institution) and other identifying information about the person (such as name, address, and ID). Your institution can customize the information shown on the Person Cards. Organization Cards include similar identifying information but do not include photographs.

The Context Area can hold person cards, organization cards, or both (depending on the form you are working with). When multiple cards are loaded into the Context Area, you can use the **Next** and **Previous** buttons to scroll through the cards.

You can also select **View All** to see all cards currently in context (see [Figure 17 on page 31](#)). When viewing all cards in context, you can go to a specific card, or you can select one or more records to map, add to Favorites, or remove from context.

If privacy codes are enabled at your institution, privacy messages for a person are displayed over the Context Area for a few seconds then fade away. An exclamation mark indicator (!) in the far left of the card title area indicates that a privacy message is available for a person. Click this indicator to view the privacy message again. If the privacy settings do not allow you to access a person's record, you will only be able to see the name and ID of the person, with a message stating that the record is not accessible because of privacy settings.

If allowed by your institution, you can click the **Mapping** (push pin) button to map the addresses of the current card or all cards in the Context Area.

Click the **Add to Favorites** (gold star) button to add the current card or all cards to your People Favorites.

Click the **Launch Copy Window** (green page) button to open a new browser window with the contents of the current context card in a format that lets you select and copy the text and then paste it into another application. If you only want to copy one field of information from the Context Area, you can select and copy it directly from the context area without opening the copy window.

Click the **Context Area Help** (question mark) button to access the online help for the Context Area.

Click the **Close** (x) button to close the current card or all cards in the Context Area.

Many of the features in the Context Area are accessible through keyboard shortcuts. See [“Keyboard Shortcuts” on page 76](#) for a full list of all available keyboard shortcuts.

Colleague Administrators can customize the information shown in the Context Area. For more information, see your Colleague System Administrator or the [User Interface 4.3 Installation and Administration](#) manual.

Figure 16: The Context Area

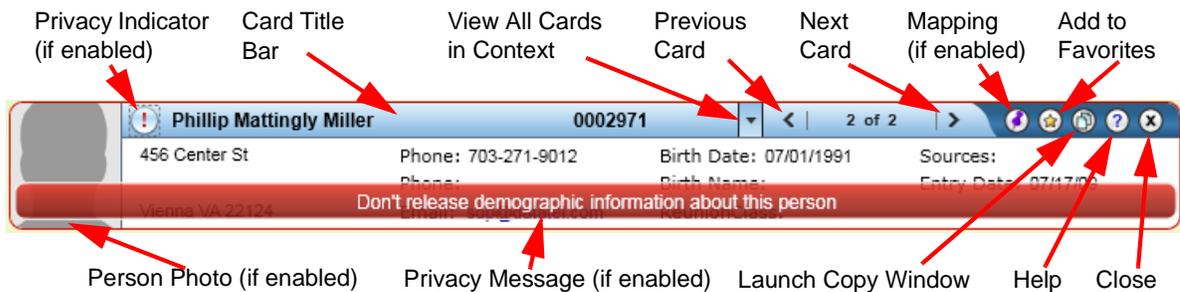
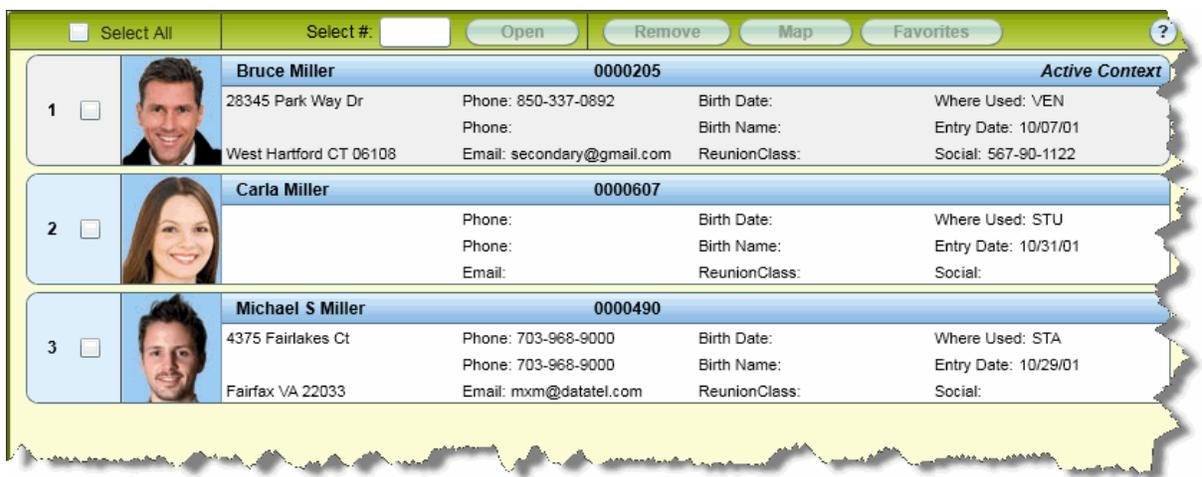


Figure 17: View All Cards in Context



## The Form Area

The Form Area displays the Colleague forms that you are currently working with. See [Figure 12 on page 24](#) for an example of the Form Area.

Several features are available in the tool bar at the top of the Form Area, including menus (see [page 27](#) for a description), **Context** option, **Save** and **Cancel** buttons, the Form Scale Slider, and the **Form Print** button. The **Save**

**All** and **Cancel All** buttons enable you to save or cancel all of your changes simultaneously to every form that is currently open in this session. The **Save** and **Cancel** buttons enable you to save or cancel changes to the current form.



**Note:** The **Context** option allows you to specify what you want Colleague to do with open contexts when you save or cancel from a form. The **Auto-Close Context** option also closes all contexts when you save the last card in the Context Area. This applies to person-related forms only.



**Technical Tip:** **Cancel All** does not cancel all changes made to all people in the context area. It cancels out of any detail forms and cancels changes to the current record only. When you move from one person to the next in the context area, you are prompted to save any changes made to the first person. Changes are saved automatically if your institution has final prompting turned off. (Datatel recommends that final prompting be turned ON.)

### ***Form and Window Size***

UI 4.3 was designed using a minimum screen resolution of 1024x768. If you need to make the whole UI 4.3 window larger or smaller to fit the desired screen space on your computer, resize the window as you would any other window on your computer.

Each Colleague form is initially sized to fit within the given Form Area space. If you need to make a form larger or smaller, use the Form Scale Slider to zoom in or out. The form scale setting for individual forms is retained for future sessions.

To set a default scale factor for all forms, set the scale factor for the current form and use the **Options > Set Form Scale Default** option to set the factor for all forms. To clear all form scale values, use the **Options > Clear All Form Scale Values** option, and then click **OK** to confirm this action.

## Colleague Forms in UI 4.3

See [Figure 12 on page 24](#) for an example of a Colleague form in UI 4.3. This section describes each part of the form in more detail and provides information on how to use the features within a form.

### Form Mnemonic and Name

The form name and mnemonic for the current form are displayed on a tab at the top of the form, just below the tool bar (see [Figure 18](#)). If one or more detail forms are also open, a tab is displayed for each form. The form's mnemonic provides you with a quick way to identify a form.



**Note:** When multiple forms are open, each form has its own tab. The tab farthest to the right represents the active form. To ensure that each record is completed properly, only one form can be edited at a time. All forms below the current open form are inquiry only and do not allow input. Data on these forms is grayed out while another form is active.

**Figure 18:** Form Mnemonic and Name



### Fields

A *field* is any place on the form where data is displayed or where you enter data. In most cases, each field is accompanied by a field label indicating what kind of data belongs in the field.

What you are allowed to enter in a field may be restricted by Colleague. For example, a field may allow you to enter only letters, or numbers, or specific values from a list. Standard data entry fields (such as the Country field on the Name and Address Entry form shown in [Figure 12 on page 24](#)) have a white background. Inquiry fields (such as the Person ID field on the Name and Address Entry form shown in [Figure 12](#)) have a shaded background. Required fields (such as the Last Name field on the Name and Address Entry form shown in [Figure 12](#)) have a white background with a red outline and a red dot in the upper left-hand corner.

## Tables

A *table* within a form is a set of related fields. A table can have a different value on each line, or row. Furthermore, there are usually several fields in each row of a table that are associated with each other in some way. Some tables are row-oriented and some are column-oriented. In either case, the intersection of a column and a row is referred to as an *element*. On the Name and Address Entry form shown in [Figure 12 on page 24](#), the Phone/Ext/Type group of fields is an example of a table. Each phone number entered can have an associated extension and type, and you can enter multiple phone numbers.

### Table Operation Button

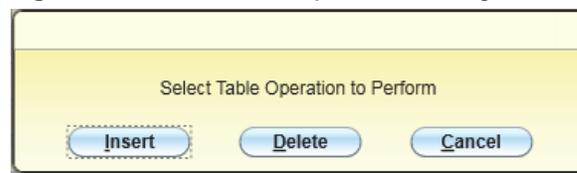
A **Table Operation** button enables you to insert or delete a row of data within a table.

**Figure 19:** The Table Operation Button



When you click the **Table Operation** button, a dialog box is displayed, as shown in [Figure 20](#).

**Figure 20:** Select Table Operation Dialog Box



From the **Select Table Operation** dialog box, select one of the following options:

- Click **Insert** to insert a new row above the current row.
- Click **Delete** to delete the current row.
- Click **Cancel** to leave the row unchanged and return to editing.

## Scrolling and Exporting

When your cursor is within table, a controller appears at the top of the table that lets you scroll through the rows and pages of data (see [Figure 21](#)). This controller also includes a **Background Toggle** button that lets you make the background transparent and an **Export** button that lets you export the entire contents of the table to an Excel spreadsheet.

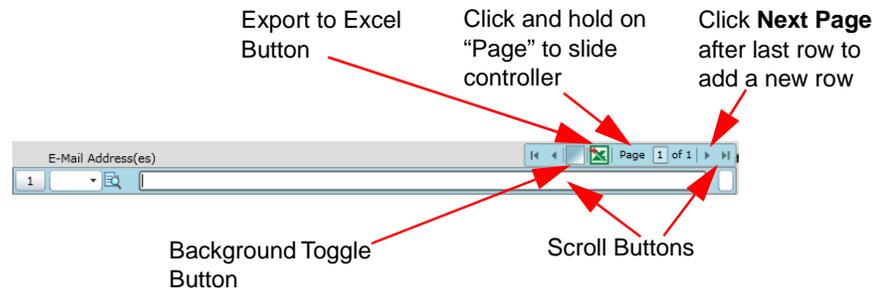


**Note:** Security restrictions apply to the fields exported to Excel. If you do not have access to a field in Colleague due to security, that field will not be exported to Excel.

If the controller blocks your view of another field on the form, you can click and hold the word “Page” on the controller to grab it, then move your mouse to slide it left or right. Release the mouse button to let go of the controller when it is at the desired location.

When the last row of data in the table is shown, you can click **Next Page** to access a new blank row. If the form allows it, you can add new data on this blank row.

**Figure 21:** Scroll and Export Controller

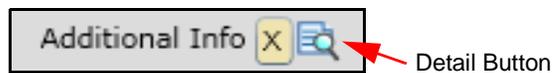


## Detail Button

Some forms give you only limited or summary information about a certain item, but provide you with the capability of moving to another form. This form, which is known as a *detail form*, provides more complete information on that item.

You will know a detail form is available from a field if there is a **Detail** button to the right of the field. Such fields are referred to as *detail fields*. See [Figure 22](#) for an example of a detail field with a detail button.

**Figure 22:** Detail Button



## Date/Calendar Button

A **Date/Calendar** button appears to the right of each date field.

**Figure 23:** The Date/Calendar Button



Click the **Date/Calendar** button to display the calendar browser, as shown in [Figure 24](#). Click the desired date in the calendar to select it.

**Figure 24:** Calendar Browser



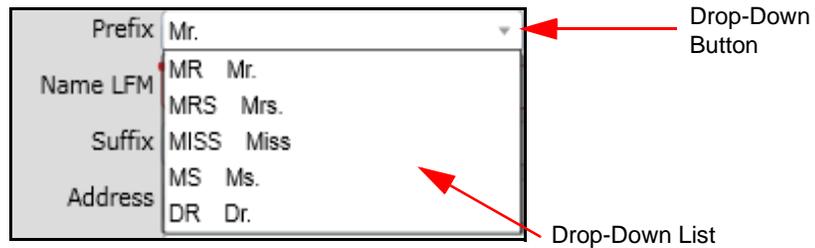
## Drop-Down List Button

A **Drop-Down List** button appears to the right of each field that has a predetermined set of valid entries. Click the **Drop-Down List** button to display a list of valid codes. Click the appropriate code to select it.



**Note:** You can also use the down arrow key to open the list, then use the up and down arrow keys to move through the list and highlight the entry you want. Press **Enter** to select it.

**Figure 25:** Drop-Down List



# Accessing Forms and Information

You can access forms and information in several ways:

- Person Search
- Form Search
- Navigation Panel
- Favorites Panel
- LookUp

## Person Search

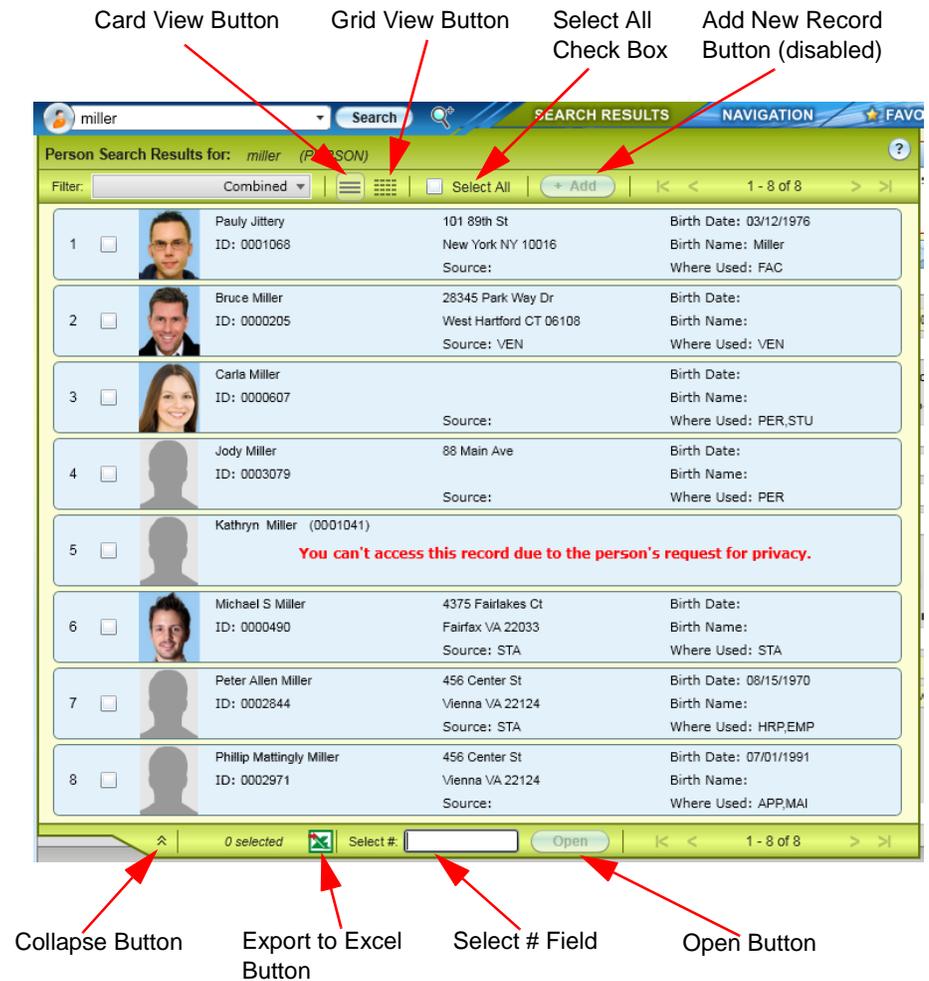
When you use Person Search or LookUp to search for person records (individuals, organizations, students, etc.), the results are displayed on the **Search Results** panel. The **Search Results** panel has two views: card view and grid view. Each of these views is discussed in more detail in the following sections.

### Person Search Results Panel: Card View

When you search for a person or corporation, the search results show all records that match the search criteria you entered. When viewing search results in Card View, you can see photos (for people) in addition to other information about the records, such as addresses or phone numbers. The information displayed in the search results for Card View can be customized for your institution.

To switch between Card View and Grid View, click the **Card View** or **Grid View** button at the top of the **Search Results** panel (see [Figure 26](#)).

Figure 26: Person Search Results, shown in Card View



## Selecting Records

To select a record to work with, click anywhere on the card. When you click anywhere on a card, the color changes to indicate that it is selected. You can double-click on a single record to select it and open it in the Context Area.

Figure 27: Selecting Records Example

1	<input type="checkbox"/>	 Pauly Jittery ID: 0001068	101 89th St New York NY 10016 Source:	Birth Date: 03/12/1976 Birth Name: Miller Where Used: FAC
2	<input checked="" type="checkbox"/>	 Bruce Miller ID: 0000205	28345 Park Way Dr West Hartford CT 06108 Source: VEN	Birth Date: Birth Name: Where Used: VEN
3	<input type="checkbox"/>	 Carla Miller ID: 0000607	Source:	Birth Date: Birth Name: Where Used: PER,STU

To select multiple records, click on more than one card. Click on a selected card again to cancel the selection.

In the Select # field, you can also enter the numbers of the records that you want to select, separated by commas for individual record numbers. Use a dash to enter a range of record numbers.

Use the **Select All** check box to select all search results. This option selects all pages of search results, not just the current page of results.



**Technical Tip:** Some forms do not allow you to select more than one record at a time.

## Opening Records

After selecting the records you want to work with, click **Open** to add those records to the Context Area. If any records were already in the Context Area, new ones added from this search will appear in sequence immediately after the current card. The first card of the selected records will be in focus, and the current form will be populated with that record's information.

## Exporting Records

To export search result records to a Microsoft Excel spreadsheet, click the **Excel** icon (to the left of the Select # field). All search results records are exported to a spreadsheet. If the browser does not automatically open the spreadsheet, you are prompted to open or save it. When the export is complete, you can close both the informational window and dialog box.

### ***Adding a New Record (if allowed)***

If you cannot find the record you want in the search results, enter **A** at the **Select #** text box or click the **Add New Record** button at the top of the **Search Results** panel. If adding a new record is not allowed, this button is not available (grayed out). Be sure to follow your institution's record search procedures to search existing records thoroughly before adding a new record (to reduce the occurrence of duplicate records). When you click the **Add New Record** button, the search panel is collapsed, and you are able to enter information for the new record on the UI form presented.



**Note:** The **Add New Record** button is enabled only if you accessed the **Search Results** panel by searching for records from the LookUp prompt *and* if the form allows you to add a new record. If you perform a person search first (before opening a form), the Add New Record button is not available because each form dictates whether new records can be added or not. If a form is open and you perform a search using the search feature rather than LookUp, the **Add New Record** button is not available. The LookUp prompt can be accessed by opening the form first or by finishing from the last person card in the Context Area.

### ***Filtering Results***

If your search results contain both person and organization records, you can use the filter feature to show only person records (individuals), organization records (organizations), or both (combined). To filter your search results, click the **Filter** drop-down and select the option that you want to use for filtering.

### ***Sorting Results***

Sorting search results is available only in Grid View. To sort search results, first switch to Grid View by clicking the **Grid View** button at the top of the **Search Results** panel if necessary. In Grid View, you can sort the person search results by any available column. Click once on a column header to sort the results by that column in ascending order (low to high or alphabetical), then click the column again to sort the results by that column in descending order (high to low or reverse alphabetical).

### ***Returning to Your Most Recent Set of Search Results***

To return to the most recent person search results, select the **Person** option in the search area and then open the **Search Results** panel. Select the **Form** option in the search area to see the most recent form search results.



**Note:** The **Search Results** panel only retains the results of the most recent form search or person search performed from the Search Area. Prior search results from LookUp prompts are not retained on the **Search Results** panel.

### **Person Search Results Panel: Grid View**

When you search for a person or corporation, the search results show all records that match the search criteria that you entered. Search results in Grid View are displayed in a spreadsheet format, with the results in rows and columns. You can sort the results on any available column. You can resize the columns if needed. You may have to scroll horizontally in the **Search Results** panel to see all available columns. You can click and drag a column heading to rearrange the columns. The information displayed in the search results for Grid View can be customized for your institution.



**Note:** Person photos are not available in Grid View. Photos are available in Card View only.

To switch from Grid View to Card View, click the **Card View** button at the top of the **Search Results** panel.

Figure 28: Person Search Results Panel: Grid View

#	Name	ID	Address Line	Address CSZ	Source	DOB	Birth Last	Where
1	Pauly Jittery	0001068	101 89th St	New York NY 10016		03/12/1976	Miller	FAC
2	Bruce Miller	0000205	28345 Park Way Dr	West Hartford CT 06108	VEN			VEN
3	Carla Miller	0000607						PER,S
4	Jody Miller	0003079	88 Main Ave					PER
5	Kathryn Miller	0001041						
6	Michael S Miller	0000490	4375 Fairlakes Ct	Fairfax VA 22033	STA			STA
7	Peter Allen Miller	0002844	456 Center St	Vienna VA 22124	STA	08/15/1970		HRPEI
8	Phillip Mattingly Miller	0002971	456 Center St	Vienna VA 22124		07/01/1991		APPM

### Selecting Records

To select a record to work with, click anywhere on the row for that record. When you click anywhere on a row, the color changes to indicate that it is selected. A triangle also appears in the left column to indicate that it is selected. Double-click on a single record to select it and open it in the Context Area.

To select multiple records in sequence, click on the first record you want and then Shift+click on the last record in the sequence. To select multiple person records that are not in sequence, click on the first record you want and then Ctrl+click on the other records.

You can also enter the numbers of the records you want to select in the Select # field, separated by commas for individual record numbers. Use a dash to enter a range of record numbers.

Click **Select All** to select all records shown in the search results. This option selects all pages of search results, not just the current page of results.



**Technical Tip:** Some forms do not allow you to select more than one record at a time.

### ***Opening Records***

After selecting the records you want to work with, click **Open** to add those records to the Context Area. New cards added to the Context Area from this search will appear in sequence after existing cards.

### ***Exporting Records***

To export search result records to a Microsoft Excel spreadsheet, click the **Excel** icon (to the left of the Select # field). All search results records are exported to a spreadsheet. If the browser does not automatically open the spreadsheet, you are prompted to open or save it. When the export is complete, you can close both the informational window and dialog box.

### ***Adding a New Record (if allowed)***

If you cannot find the record you want in the search results, enter **A** at the **Select #** text box or click the **Add New Record** button at the top of the **Search Results** panel. If adding a new record is not allowed, this button is not available (grayed out). Be sure to follow your institution's record search procedures to search existing records thoroughly before adding a new record (to reduce the occurrence of duplicate records). When you click the **Add New Record** button, the search panel is collapsed, and you are able to enter information for the new record on the UI form presented.



**Note:** The **Add New Record** button is enabled only if you accessed the **Search Results** panel by searching for records from the LookUp prompt *and* if the form allows you to add a new record. If you perform a person search first (before opening a form), the Add New Record button is not available because each form dictates whether new records can be added or not. If a form is open and you perform a search using the search feature rather than LookUp, the **Add New Record** button is not available. The LookUp prompt can be accessed by opening the form first or by finishing from the last person card in the Context Area.

### ***Filtering Results***

If your search results contain both person and organization records, you can use the filter feature to show only person records (individuals), organization records (organizations), or both (combined). To filter your search results, click the **Filter** drop-down and select the option that you want to use for filtering.

### ***Sorting Results***

In Grid View, you can sort the person search results by any available column. Click once on a column header to sort the results by that column in ascending order (low to high or alphabetical), then click the column again to sort the results by that column in descending order (high to low or reverse alphabetical).

### ***Returning to Your Most Recent Set of Search Results***

To return to the most recent person search results, select the **Person** option in the search area and then open the **Search Results** tab. Select the **Form** option in the search area to see the most recent form search results.



**Note:** The **Search Results** panel only retains the results of the most recent form search or person search performed from the Search Area. Prior search results from LookUp prompts are not retained on the **Search Results** panel.

### **Advanced Person Search**

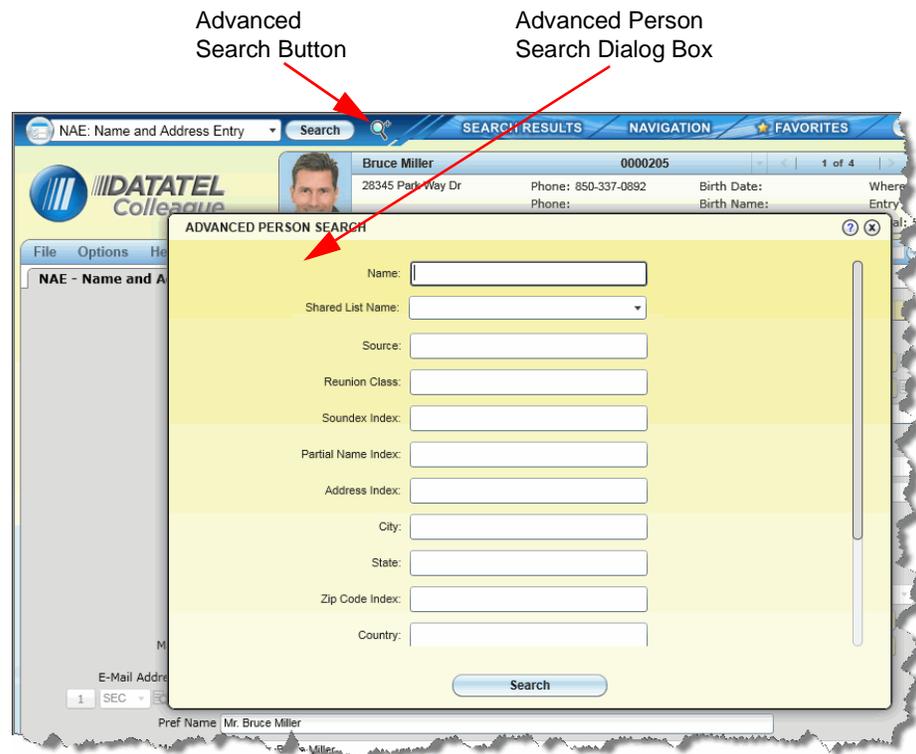
The **Advanced Person Search** feature lets you search for person-related records using one or more additional criteria defined by your institution. The **Advanced Person Search** feature also lets you retrieve a previously saved shared list name.

To access the **Advanced Person Search** dialog box, click on the **Advanced Search** (magnifying glass with plus sign) button to the right of the **Search** button. See an example of the **Advanced Person Search** dialog box in [Figure 29](#). You can enter criteria in one or more fields on this dialog box to search for people that meet all of the criteria specified.

Use the **Shared List Name** field to retrieve your own or another user's shared list (saved list). List names are always stored in all uppercase letters, regardless of the case used when the list was created. The last ten recently

created shared lists are displayed in the list. Enter the shared list name in the field or select the name from the list, and then click **Search**. The person records from the shared list are loaded as person search results.

**Figure 29:** Advanced Person Search Dialog Box



### ***Procedure for Copying a List of Favorites***

To create your own copy of a shared list of people in your Favorites, follow these steps.

- Step 1.** Make sure your Context Area is clear (no people cards loaded into it). If necessary, collapse the **Person Search Results** panel to get to the Context Area and close out all cards.
  
- Step 2.** From the **Advanced Person Search** dialog box, enter or select the name of the shared list you want to copy in the **Shared List Name** field.
  
- Step 3.** Click **Search**. The records from the shared list are loaded as person search results on the **Search Results** panel.
  
- Step 4.** From the **Search Results** panel, click **Select All**, then **Open** to load all records into the Context Area.
  
- Step 5.** From the Context Area, select the **Add to Favorites** (gold star) button and select **Add All to Favorites**.
  
- Step 6.** Create a folder for the list, and then click **Add**.



**Note:** If you save a copy of a shared list in your Favorites, remember that the list in your Favorites is a local copy. If changes are made to either the shared list or to your local copy, the lists will no longer be identical. If you want to be sure you are working with the correct and current shared list of people each time, select the shared list on the Advanced Person Search each time rather than selecting the copy in your Favorites.

## **Form Search**

When you search for a form, the search results show all records that match the search criteria you entered.

The results are displayed in Grid View, with the results in rows and columns. Icons also indicate the type of form (maintenance, inquiry, report, or procedure). You can sort the results on any available column. You can resize the columns if needed, and you may have to scroll horizontally in the **Search Results** panel to see all available columns.

In most cases, when you enter a mnemonic in the form search text box, that form appears right away and the search results are not shown. If a mnemonic exactly matches the form search term entered, that form opens. If you enter a word or part of a word in the title of a form, the **Search Results** panel shows all forms that match the criteria entered.

To immediately open a specific application/mnemonic pair, enter your search as application-mnemonic, such as CORE-NAE. Forms opened in this way are not stored in your search history. Also, forms that require an explicit selection of the application to open will prompt you for the application when loading.

When you see the **Form Search Results** panel, you can either select one of the forms shown or start a new search.

### Selecting a Form

To select a form from the **Form Search Results** panel, click anywhere on the row for that form. You can only select one form from the **Search Results** panel. The selected row changes color to show which form is selected.

### Opening a Form

To open a form from the **Form Search Results** panel, double-click on it. You can also open the selected form by clicking **Open**.

### Sorting Results

Click once on a column header to sort the results by that column in ascending order (low to high or alphabetical), then click the column again to sort the results by that column in descending order (high to low or reverse alphabetical).

### ***Returning to Your Most Recent Set of Search Results***

To return to the most recent form search results, select the **Form** option in the search area and then open the **Search Results** tab. Select the **Person** option in the search area to see the most recent person search results.



**Note:** The **Search Results** panel only retains the results of the most recent form search or person search performed from the Search Area. Prior search results from LookUp prompts are not retained on the **Search Results** panel.

## **Navigation Panel**

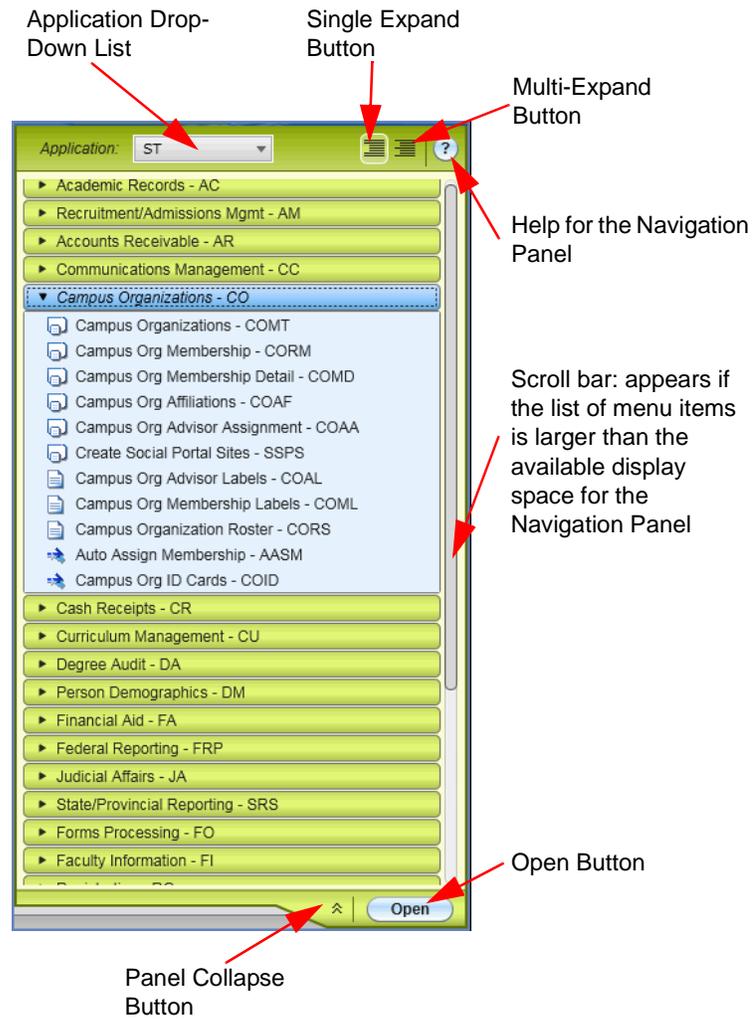
Use the **Navigation** panel to locate a Colleague form by navigating through the Colleague menu structure. The **Navigation** panel shows all menus and forms that you are able to access in Colleague. To access the **Navigation** panel, click the **Navigation** tab. See [Figure 30](#) for an example of the **Navigation** panel.

Select the application you want to work with from the application drop-down list at the top of the **Navigation** panel. When the menus load, click on a menu to expand it. Menus can include other menus, so you can continue to expand them until only forms are listed.

When you see the form you want to access, highlight it and click **Open** to open it. You can also double-click on the form name to open it.

In the top right corner of the **Navigation** panel, two buttons control how menus are expanded. Click the **Single Expand** button to expand only the selected menu and collapse any other menus that are currently expanded. Click the **Multi Expand** button to keep currently expanded menus open when you expand a new one. With this option, expanded menus will remain expanded until you explicitly collapse them.

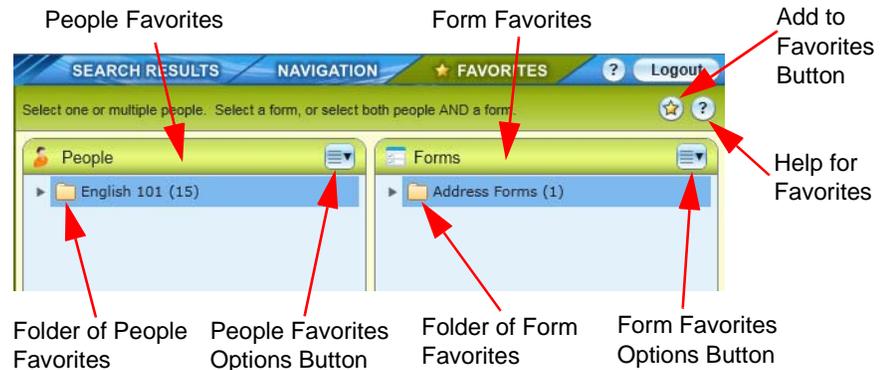
Figure 30: Navigation Panel



## Favorites Panel

Use the **Favorites** panel to retrieve and manage saved people or forms. To access the **Favorites** panel, click the **Favorites** tab. See [Figure 31](#) for an example of the **Favorites** panel.

**Figure 31:** Favorites Panel



### Adding a Person or Form to Favorites

You can add one or more people to your Favorites by clicking the **Add to Favorites** button (gold star) in the Context Area. When you click this button, you can choose to add only the current person to Favorites, or all people currently in the Context Area to Favorites.

To add the current form to your Favorites, click the **Add to Favorites** (gold star) button in the upper right corner of the UI Form area.

You can also add all active people or the active form to your Favorites by clicking the **Add to Favorites** button (gold star) directly in the **Favorites** panel.

When you click the **Add to Favorites** button, the **Add to Favorites** dialog box appears. You can select an existing folder or create a new one to store the selected Favorites. For more details on how to use the **Add to Favorites** dialog box, click the **Help** button in the dialog box.

## Selecting People from Favorites

To select a favorite person, navigate through the folders to locate the person record that you want to work with.

Click the record to highlight it, and then click **Open** to add that person's record to the Context Area. You can also double-click on a record to open it.

To retrieve multiple people from Favorites, navigate through the folders and locate the people you want to work with. Highlight one person, and then use **Shift+click** to highlight a continuous group of people. Use **Ctrl+click** to highlight multiple people that are not in a continuous list. Click **Open** to add all highlighted people to the Context Area.

To retrieve an entire folder of people records from the **Favorites** panel, highlight the folder name, and then click **Open** to add all records in that folder to the Context Area. You can also double-click a folder name to add all records in that folder to the Context Area.



**Note:** To expand a folder, click the triangle to the left of the folder name.

## Selecting a Form from Favorites

You can only select one form at a time from Favorites. Navigate through the folders to locate the form you want. Click the form to highlight it, and then click **Open**.



**Note:** To expand a folder, click the triangle to the left of the folder name.

## Selecting People and Forms Together from Favorites

If allowed, from the **Favorites** panel, you can select one or more people and a person-related form at the same time. Highlight the people you want to work with, and then highlight the form you want to use. Click **Open**. The people are added to the Context Header, and the form is opened with the first person's information loaded in.



**Note:** When selecting people and a form together, person information is only loaded into the form if it 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.

## Managing Favorites

From the **Favorites** panel, you can drag items from one folder to another. You can also drag entire folders to different levels within the folder structure.

In the upper right corner of the People Favorites area and the Form Favorites area, there is an **Options** button with a drop-down list of available options. Use these options to manage your Favorites:

- **Create Shared List** (available only from the People Favorites **Options** button). Use this option to create a shared list of people records (stored as a saved list in Colleague). Select one or more people from your Favorites, or a folder of people, and then click **Create Shared List** to create a list that can be shared with coworkers. For example, if you create a list of students that is the definitive list of students in the class of 2010, you can share that list with other users who need to work with the same list of students. The shared list ensures that everyone works with the same group of people, and individual users do not have to create their own list. When you select this option, the **Create Shared List** dialog box appears. For more details on how to use the **Create Shared List** dialog box, click the **Create Shared List Help** button.
- **Recently Created Shared List.** Use this option to view the last ten recently created shared lists.
- **Collapse All.** Use this option to collapse all Favorite People or Form folders.
- **Expand All.** Use this option to expand all Favorite People or Form folders.
- **Rename.** Use this option to edit or rename a folder or item in your list of saved people or forms. Highlight the folder or item you want to rename,

and then select **Rename** from the **Options** button drop-down menu to edit or rename the selected item.



**Note:** This option does not change the name of the person or form in Colleague. The item is renamed only in your Favorites.

- **Remove Selected.** Use this option from the People Favorite **Options** button to remove one or more people or people folders from your Favorites. Use this option from the Form Favorite **Options** button to remove one or more forms or form folders from your Favorites. Select the items you want to remove, and then select **Remove Selected** from the **Options** button drop-down menu to remove them from your Favorites.

# LookUp

Most maintenance forms require you to select a specific record to view or maintain. For example, to register a student for a course section, you must first select the student and the course section to work with.

You specify the record to work with by responding to the LookUp prompt that is displayed after you access a form. LookUp prompts are labeled according to the type of LookUp you are performing.

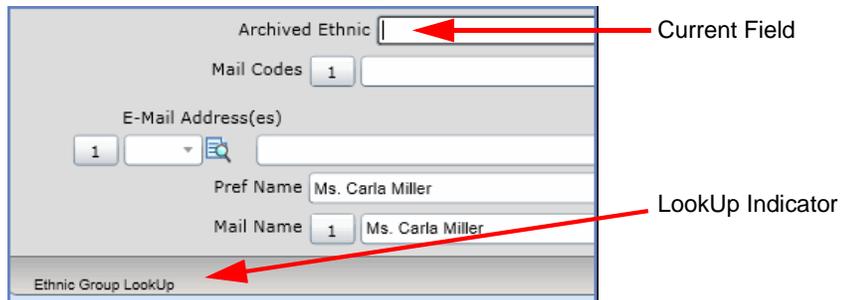
LookUps pertaining to people or organizations are referred to as person-related and organization-related LookUps. Examples include Person LookUp, Student LookUp, Applicant LookUp, and Vendor LookUp.

In UI 4.3, Person-related LookUps are bypassed if the form uses Person LookUp as the primary LookUp and you already have one or more person cards in the Context Area. If you access a person-related form first, and there are no person cards in the Context Area, a LookUp prompt is presented.

All LookUps show the results of the LookUp as search results on the **Search Results** panel.

Primary LookUps for a form are displayed as LookUp prompts that pop up as dialog boxes. However, some fields within forms are validated against other files. LookUp is used within such fields to help you locate valid codes or items that you want to associate with the main record on which you are working. When you are in a field that is validated against another file, you will see a LookUp indicator in the lower left corner of the form, as shown in [Figure 32](#).

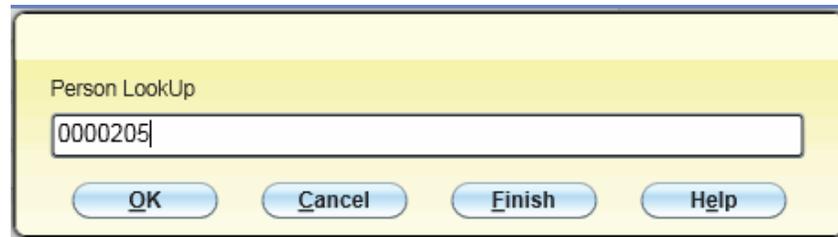
**Figure 32:** Example LookUp Indicator for a Field on the NAE Form



## Using LookUp to Find Records

If you know the ID, or key, for the record that you need, you can simply enter it at the LookUp prompt. For example, Bruce Miller’s ID number is 0000205. If you enter **0000205** at the Person LookUp prompt for the Name and Address Maintenance (NAE) form, information about Mr. Miller is displayed.

**Figure 33:** Person LookUp Prompt



When you do not know the record ID, LookUp provides a number of options that help you find the record using the information you do have available.

For example, if you do not know Mr. Miller’s ID number, you can enter his last name at the Person LookUp prompt. If you enter “miller” at the Person LookUp prompt for the NAE form, the **Person Search Results** panel displays a list of all the people in your database whose names begin with “Miller.” You can then select Bruce Miller from this list.

You can use many shortcuts when working with LookUp prompts. See [“LookUp Shortcuts” beginning on page 56](#) for more information about finding multiple records.



**Note:** LookUp shortcuts are also available when using the Person Search feature in UI 4.3.

If the form allows you to add a person record, you are only able to add a new record by using Person LookUp. You cannot add a new record when using the Person Search feature.

## LookUp Shortcuts

There are a number of standard LookUp options available to help you with almost all types of LookUp.

In addition to these standard options, many types of LookUp also provide special shortcuts to help you find what you are looking for. See [“Person and Organization LookUp Shortcuts” beginning on page 60](#) for more information about special LookUps.



**Technical Tip:** The shortcuts may be modified by your system administrator. Please verify them with your system administrator if they work differently in your environment. The shortcuts can also be used in search boxes.

### Standard LookUp Shortcuts

There are several LookUp shortcuts that work with most types of LookUp. LookUp options that do *not* work for person-related and organization-related LookUps are noted in the “Hints” column in [Table 1](#).

**Table 1:** Standard LookUp Shortcuts

Example Scenario	LookUp Prompt Entry	Hints
The last record you displayed during this login session.	An “at” sign (@)  For example, both the Name and Address Maintenance (NAE) form and the Address Maintenance (ADR) form are people-related forms. If you display Fred Smith’s record on the NAE form, and then you access the ADR form, you can retrieve Mr. Smith’s record on the ADR form by entering @.	The “at” (@) sign allows you to retrieve the last form-appropriate record you displayed in most, but not all, cases.
A list of all records appropriate for this form.	An ellipsis (. . .)	Due to the size of Person and Organization LookUp, the ellipsis is not supported for these files.
A list of fields in the file that contains the record you are seeking.	A semicolon (;)	You can use the field names to construct a query statement to look for a record.
All records in which a specific field contains a value (that is, the field is not blank).	<b>;fieldname</b>  For example, on the Approvals Needed (APRN) form in the Colleague Finance Accounts Payable module, to see a list of approval records for individuals who are limited in the purchase order amount they may approve, enter the following:  <b>;apprv.po.max.amt</b>	

Table 1: Standard LookUp Shortcuts (cont'd)

Example Scenario	LookUp Prompt Entry	Hints
<p>All records in which a specific field's value matches a particular string.</p>	<p><b><i>;fieldname string</i></b></p> <p>For example, on the APRN form in the Colleague Finance Accounts Payable module, to see a list of approval records for individuals who can approve up to \$10,000 on a purchase order, enter the following:</p> <p><b><i>;apprv.po.max.amt 10000</i></b></p>	<p>Text values, such as "Hall," are often case-sensitive.</p> <p>With the exception of a person's name, multiword values must be enclosed within double quotes.</p> <p>You can also look for multiple values at one time. For example, to see a list of approval records for individuals who can approve up to \$10,000 or up to \$15,000 on a purchase order, enter the following:</p> <p><b><i>;apprv.po.max.amt 10000 15000</i></b></p>
<p>All records in which a specific field's value begins with a particular string.</p>	<p><b><i>;field string...</i></b></p> <p>For example, on the Job Skill Definition (JSKL) form in the Colleague HR Personnel module, to see a list of all job skill definitions whose descriptions begin with the word "Typing" or "Type," enter the following:</p> <p><b><i>;jsk.desc Typ...</i></b></p>	<p>Use this option when you are not sure how the item you are looking for is spelled or worded but you know how it starts.</p> <p>Remember that text values, such as "Typ," are often case-sensitive.</p>
<p>All records in which a specific field's value contains a particular string.</p>	<p><b><i>;fieldname ...string...</i></b></p> <p>For example, on the JSKL form in the Colleague HR Personnel module, to see a list of all job skill definitions whose descriptions have the word "Typing" or "Type" in them, enter the following:</p> <p><b><i>;jsk.desc ...Typ...</i></b></p>	<p>Use this option when you are not sure how the item you are looking for is spelled or worded but you know that it contains a certain word or part of a word.</p> <p>Remember that text values, such as "Typ," are often case-sensitive.</p>
<p>All records in which a specific field's value ends with a particular string.</p>	<p><b><i>;fieldname ...string</i></b></p> <p>For example, on the JSKL form in the Colleague HR Personnel module, to see a list of all job skill definitions whose descriptions end with the word "Wpm," enter the following:</p> <p><b><i>;jsk.desc ...Wpm</i></b></p>	<p>Use this option when you are not sure how the item you are looking for is spelled or worded but you are fairly certain about how it ends.</p> <p>Remember that text values such as "Wpm," are often case-sensitive.</p>

**Table 1:** Standard LookUp Shortcuts (cont'd)

Example Scenario	LookUp Prompt Entry	Hints
<p>All records in which a specific field's value contains several strings.</p>	<p><i>;fieldname</i> <i>...string1...string2</i></p> <p>or any combination of strings and ellipses to achieve the desired result.</p> <p>For example, on the JSKL form in the Colleague HR Personnel module, to see a list of all job skill definitions whose descriptions contained the word "Typing" followed by the number "80," enter the following:</p> <p><i>;jsk.desc</i> <i>...Typing...80...</i></p>	<p>Use this option when you are not sure how the item you are looking for is spelled or worded but you know that it contains certain words or parts of words. You can use any combination of ellipses and strings to find what you are looking for.</p> <p>Remember that text values, such as "Typing," are often case-sensitive.</p>
<p>All records in which a specific field's value is related in some way to a particular string (for example, is greater than or less than something).</p>	<p><i>;fieldname operator string</i></p> <p>The following are valid operators:</p> <ul style="list-style-type: none"> <li>• = or <b>EQ</b> (equal)</li> <li>• &lt;&gt; or <b>NE</b> (not equal)</li> <li>• &gt; or <b>GT</b> (greater than)</li> <li>• &gt;= or <b>GE</b> (greater than or equal to)</li> <li>• &lt; or <b>LT</b> (less than)</li> <li>• &lt;= or <b>LE</b> (less than or equal to)</li> <li>• <b>UNLIKE</b> (use this operator only when you use an ellipsis in specifying a data value)</li> </ul> <p>For example, on the APRN form in the Colleague Finance Accounts Payable module, to see a list of approval records that were added on or after January 1, 2009, enter the following:</p> <p><i>;approvals.add.date</i> <i>ge 010109</i></p>	

### Person and Organization LookUp Shortcuts

The information most commonly used to look for a person or organization is the name of the person or organization. Table 2 presents the LookUp shortcuts that you can use with person-related and organization-related LookUps. These shortcuts also correspond to the available options on the **Advanced Person Search** dialog box.

**Table 2:** Person-Related and Organization-Related LookUp Shortcuts

Example Scenario	LookUp Prompt Entry	Hints
<p>Search using a person's name.</p>	<p><i>lastname</i> (at least the first 2 letters)</p> <p><i>lastname, firstname</i></p> <p><i>lastname, firstname middlename</i></p> <p><i>lastname, firstname middleinitial</i></p> <p><i>firstname lastname</i></p> <p><i>firstname middlename lastname</i></p> <p><i>firstname middleinitial lastname</i></p> <p>For example, to look for or add a new person with the name of Robert Taylor Smith, you could enter any of the following:</p> <p><i>sm</i></p> <p><i>smi</i></p> <p><i>smith</i></p> <p><i>smith, robert</i></p> <p><i>smith, robert taylor</i></p> <p><i>smith, robert t</i></p> <p><i>robert smith</i></p> <p><i>robert taylor smith</i></p> <p><i>robert t smith</i></p>	<p>You must enter an underscore ( _ ) between the parts of multiword names. For example,</p> <p><i>van_dyke, jo_anne</i></p> <p>You can also enter only the beginning of the first and last names (at least the first two letters of the last name). For example,</p> <p><i>sm, ro</i></p> <p><i>ro sm</i></p> <p>LookUp finds any record with a primary, birth, former, or other name like the name entered.</p> <p>If you choose to add a new record after looking someone up by his or her name in this manner, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately; for example, if you enter <i>van_dyke, jo_anne</i>, you would get "Jo Anne Van Dyke."</p>

**Table 2:** Person-Related and Organization-Related LookUp Shortcuts (cont'd)

Example Scenario	LookUp Prompt Entry	Hints
<p>Limit a name search.</p>	<p>Enter any of the following after the name:</p> <p><i>;c city</i></p> <p><i>;st state/province</i></p> <p><i>;z zipcode/postalcode</i></p> <p><i>;f country</i></p> <p><i>;y class</i></p> <p><i>;s source</i></p> <p><i>;ps status</i></p> <p>For example, to find the Robert Smith whose preferred address is in Boston, enter the following:</p> <p><b>robert smith ;c boston</b></p>	<p>You can string together more than one restriction for a search, separating each element of the search with a semicolon.</p> <p>For example, to find the Robert Smith whose preferred address is in Boston and who is associated with the reunion class of 1954, enter the following:</p> <p><b>robert smith ;c boston ;y 1954</b></p>
<p>Search using a particular Social Security or Social Insurance number.</p>	<p><i>;ss SSN/SIN</i></p> <p>For example, Mary Browning's Social Security number is 964-99-8765. If she gives you her Social Security number instead of her ID number, enter the following to look her up:</p> <p><b>;ss 964998765</b></p>	<p>You may enter hyphens, but they are not necessary.</p>
<p>Search using an organization's name.</p>	<p><i>orgname</i></p> <p>For example, to look for or add a new organization with the name of Universal Office Supplies, you could enter any of the following:</p> <p><b>universal</b></p> <p><b>office</b></p> <p><b>supplies</b></p> <p><b>universal office</b></p> <p><b>universal office supplies</b></p>	<p>If you choose to add a new record after looking up an organization by its name, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately; for example, if you enter <b>universal office supplies</b>, you get "Universal Office Supplies."</p>

**Table 2:** Person-Related and Organization-Related LookUp Shortcuts (cont'd)

Example Scenario	LookUp Prompt Entry	Hints
Limit a name search.	Enter any of the following after the name:  <i>;c city</i>  <i>;st state/province</i>  <i>;z zipcode/postalcode</i>  <i>;f country</i>  For example, if you wanted to find the Universal Office Supplies in Dayton, you could enter the following:  <i>universal ;c dayton</i>	

## Adding Records from a LookUp

You can also use LookUps to add records from certain forms.

**Table 3:** Adding Records from a LookUp Prompt

Example Scenario	LookUp Prompt Entry	Hints
Preserve capitalization as entered when adding a new person.	<p><b>=name</b></p> <p>For example, if you enter</p> <p><b>=JoAnne T di_Marco</b></p> <p>then the name is displayed exactly as you entered it.</p> <p>If you enter only</p> <p><b>joanne t di_marco</b></p> <p>then the name is capitalized as follows:</p> <p>Joanne T. Di Marco.</p>	If the name is not preceded by an equal sign, then regardless of how you entered the name, each word in the name is transformed into lowercase and then capitalized appropriately.
Preserve capitalization as entered when adding a new organization.	<p><b>=orgname</b></p> <p>For example, if you enter</p> <p><b>=e e cummings Institute</b></p> <p>then the name will be displayed exactly as you entered it. If you enter only</p> <p><b>e e cummings Institute</b></p> <p>then the name is capitalized as follows:</p> <p>E E Cummings Institute</p>	



**Note:** On the **Person Search Results** panel, you can add new records only if you searched for records from the LookUp prompt *and* if the form allows you to add a new record. If you perform a person search first (before opening a form), the **Add New Record** button is not available because each form dictates whether new records can be added or not. If a form is open and you perform a search using the search feature rather than LookUp, the **Add New Record** button is not available. The LookUp prompt can be accessed by opening the form first or by finishing from the last person card in the Context Area.

# Uploading and Downloading Files

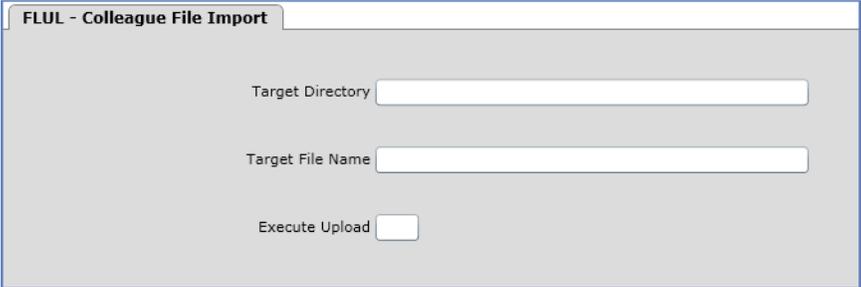
With UI 4.3, you can upload and download files between your computer and Colleague if allowed by your Colleague System Administrator. Any user can export the contents of a form table to Excel, but only users with appropriate security access can upload or download files between Colleague and their computer.

See your Colleague System Administrator if you need to upload or download files and do not have access to the required forms.

## Uploading Files to Colleague

Use the Colleague File Import (FLUL) form (see [Figure 34](#)) to upload a file from your computer to Colleague. Follow the steps below to upload a file.

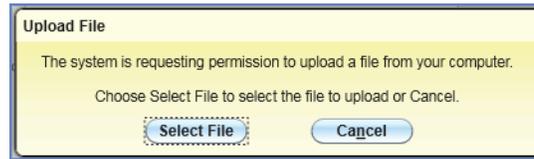
**Figure 34:** The Colleague File Import (FLUL) Form



The screenshot shows a web form titled "FLUL - Colleague File Import". It contains three input fields: "Target Directory" with a text input box, "Target File Name" with a text input box, and "Execute Upload" with a checkbox.

- Step 1.** Access the FLUL form.
- Step 2.** Complete the Target Directory and Target File Name fields. The Target Directory must be a valid UniData directory file. See the online help for more details.
- Step 3.** Enter **Yes** in the Execute Upload field. A message is displayed, alerting you that the system is requesting permission to upload a file (see [Figure 35](#)).

**Figure 35:** Permission to Upload Dialog Box



- Step 4.** From the permission message, click **Select File**. Your computer's file browser opens, and you can select the file you want to upload.
- Step 5.** From your file browser, select the file and click **OK**. The file is uploaded to the target directory.
- Step 6.** When the file upload is complete, a message is displayed. Click **OK** from the upload complete message to return to UI 4.3. The FLUL form is closed when you return to UI 4.3.

## Downloading Files from Colleague

Use the Colleague File Export (FLDL) form (see [Figure 36](#)) to download a Colleague file to your computer. Follow the steps below to download a file.

**Figure 36:** The Colleague File Export (FLDL) Form

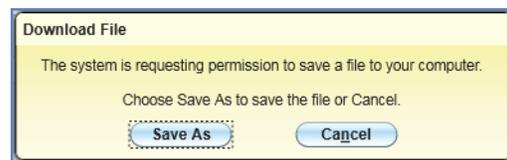
The screenshot shows a web form titled "FLDL - Colleague File Export". It contains three input fields: "Source Directory" (a text box), "Source File Name" (a text box), and "Execute Download" (a checkbox).

**Step 1.** Access the FLDL form.

**Step 2.** Complete the Source Directory and Source File Name fields. The Source Directory must be a valid UniData directory file. See the online help for more details.

**Step 3.** Enter **Yes** in the Execute Download field. A message is displayed, alerting you that the system is requesting permission to download a file (see [Figure 37](#)).

**Figure 37:** Permission to Download Dialog Box



**Step 4.** From the permission message, click **Save As**. Your computer's file browser opens, and you can select the location and file name for the file that you are about to download.

**Step 5.** From your file browser, select the file and click **OK**. The file is downloaded to the selected folder on your computer.

**Step 6.** When the file download is complete, a message is displayed. Click **OK** from the download complete message to return to UI 4.3. The FLDL form is closed when you return to UI 4.3.

# Running Batch and Report Processes

Some Colleague forms let you specify information required to process data without further interaction (a batch process) or to create a report (a report process). When you run batch and report processes, a bar graph or message displays the progress of each process.

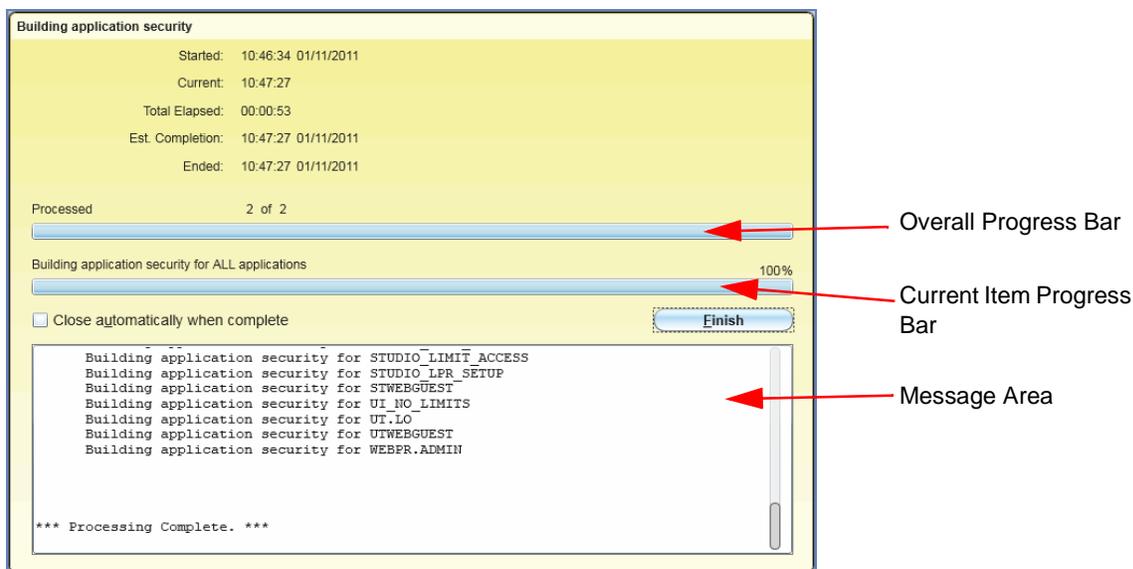


**Note:** Bar graphs and messages are not displayed when a batch or report is run in background mode.

Batch and report processes display a progress bar dialog box to visually indicate progress (see Figure 38). Some show messages within the progress bar dialog box. For batches and reports that process only one item, the top and bottom progress bars both indicate overall progress. For batches and reports that process multiple items, the top progress bar indicates overall progress, and the bottom progress bar indicates progress for the current item being processed. The window at the bottom of the progress bar dialog box displays any messages related to the progress status.

When the batch or report process is completed, click **Finish** to return to Colleague. To return to Colleague automatically when the process completes without having to click **Finish**, select the **Close automatically when complete** check box.

Figure 38: Batch and Report Progress Bar Dialog Box



# Using the Report Browser

The Report Browser allows you to view or print reports generated from Colleague. Follow the procedure below to generate and browse a report in Colleague.

## Procedure for Browsing a Report

To use the Report Browser, perform the following steps.

- Step 1.** Access and complete the Colleague form that creates the desired report. Some batch processes provide an option for producing a report of the data processing changes made. [Figure 39](#) shows an example of the Update Mail Codes (UMAI) form, which is a batch process that includes an option for generating a report. When you update from the form, the Peripheral Defaults form is displayed.



**Note:** For batch processes that can optionally generate a report, the Peripheral Defaults form is displayed only if you choose to generate a report (as shown in the Print Report field in [Figure 39](#)).

**Figure 39:** Update Mail Codes (UMAI) Form

UMAI - Update Mail Codes

Add Mail Code: Do Not Contact at Work

Delete Mail Code: [Dropdown]

Print Report: Yes

Saved List Name: [Text Field]

Person	Name
1	0000205 Dr. Bruce Miller
2	0000607 Ms. Carla Miller
3	0000490 Mr. Michael S. Miller
4	[Empty]
5	[Empty]
6	[Empty]
7	[Empty]
8	[Empty]
9	[Empty]
10	[Empty]

Additional Selection Criteria: No

Page 1 of 1

**Step 2.** In the Output Device field on the Peripheral Defaults form (see Figure 40), select **Hold/Browse File Output**. When you update from the Peripheral Defaults form, the Process Handler form is displayed.

**Figure 40:** Output Device Field: Peripheral Defaults Form

The screenshot shows a web-based form titled "UMAI - Update Mail Codes". At the top, it displays "Peripheral : SETPTR.CDF.37778" and "Description : Update Mail Codes". Below this, "Process : UMAI" and "Description :" are shown. The main section is a form with several fields: "Output Device" (a dropdown menu with "P Printer Spooler" selected), "Printer" (with options A Aux Printer, E Electronic Mail Delivery), "Form Name" (with options H Hold/Browse File Output, M MPC Printer Output), "Banner" (with option P Printer Spooler), "Security" (with option V SA/elet), "Copies" (with options SS Stylesheet Printing, PDF PDF Output), and "Defer Time" (a text input field). Below these fields is a section titled "Other Options" containing three rows: "1 NOEJECT", "2 NFMT", and "3 NHEAD", each with a text input field and a small icon. At the bottom, there are input fields for "Page Width" (132), "Page Length" (60), "Top Margin" (3), "Bottom Margin" (3), and "Max Pages per PDF".

**Step 3.** Complete the Process Handler form (see [Figure 41](#)). When you update from the Process Handler form, the batch process runs and the report is generated.



**Note:** The batch or report process displays the progress bar dialog box only if you entered **No** in the Execute in Background Mode field on the Process Handler form. See [“Running Batch and Report Processes” on page 68](#) for more information about the progress bar dialog box.

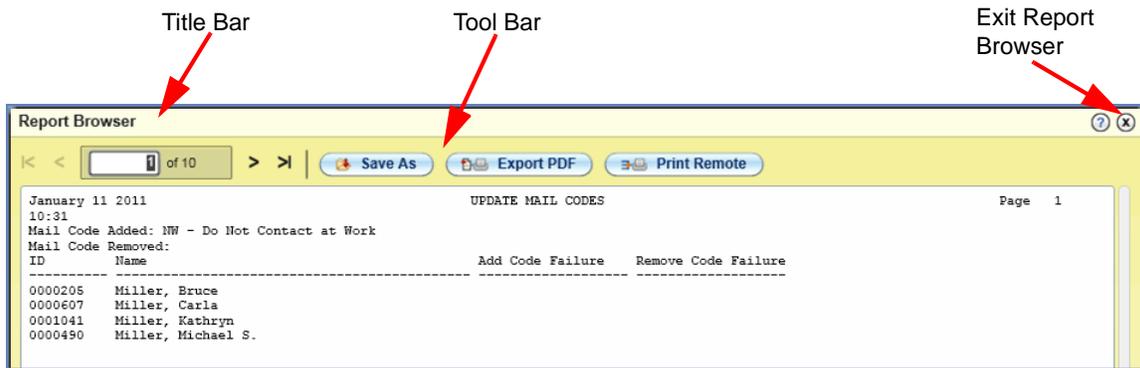
**Figure 41:** The Background Mode Form

**Step 4.** If the progress bar dialog box is displayed, monitor the progress of the batch or report and click **Finish** when processing is complete.

**Figure 42:** Progress Bar Dialog Box

**Step 5.** When you click **Finish** from the progress bar dialog box, the Report Browser is displayed. [Figure 43](#) shows a typical report page in the Report Browser.

**Figure 43:** Report Browser



**Step 6.** Use the toolbar buttons, shown in [Figure 44](#), to navigate through the report, print the report, or save a copy.

**Figure 44:** Report Browser Toolbar Detail



The Report Browser Toolbar buttons are described in [Table 4](#).

**Table 4:** Report Browser Toolbar Buttons

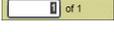
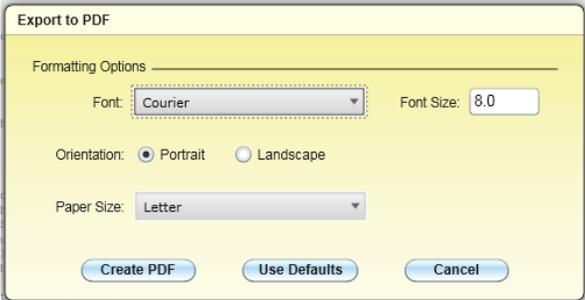
Button	Name	Description
	Report Browser Help	Opens the Report Browser help.
	Exit Report Browser	Closes the Report Browser and returns to the Colleague UI 4.3 window.
	First Page	Jumps to the first page of the report.
	Previous Page	Moves to the previous page of the report.
	Current Page/Total Pages/Change Page	Shows the number of the currently displayed page and the total number of pages in the report. You can also jump directly to any page by typing the page number in this field and then pressing Enter.
	Next Page	Moves to the next page of the report.
	Last Page	Jumps to the last page of the report.
	Save As	Saves a copy of the report to your network or local hard drive. You are prompted to specify a name and path for the saved report.

Table 4: Report Browser Toolbar Buttons (cont'd)

Button	Name	Description
	Export PDF	<p>Exports the report as a PDF file. When you select this option, the <b>Export to PDF</b> dialog box is displayed with various formatting options for the PDF file. When you select <b>Export PDF</b>, the <b>Export to PDF</b> dialog box is displayed:</p>  <p>The <b>Export to PDF</b> dialog box contains the following options:</p> <ul style="list-style-type: none"> <li>• <b>Font:</b> Select the font to be used for the text within the PDF file. Options include Courier, Helvetica, or Times New Roman. The default font is Courier.</li> <li>• <b>Font Size:</b> Enter the font size to be used for text within the PDF file. Enter a value from 1 to 100. The default font size is 10.0.</li> <li>• <b>Orientation:</b> Select whether the text within the PDF file should be displayed in the portrait or landscape orientation. The default page orientation is portrait.</li> <li>• <b>Paper Size:</b> Select the paper size of the PDF file. Options include Letter (8.5 x 11 in.), Legal (8.5 x 14 in.), Executive (7.25 x 10.5 in.), or Tabloid (11 x 17 in.). The default page size is Letter.</li> </ul> <p><b>Note:</b> For best results when exporting a PDF file, you must choose an appropriate font size and page orientation. If the font is too large, the report may not page properly or may line wrap at the right margin. For reports that are up to 80 characters wide, use a font size of 10 and portrait orientation. For reports that are between 81 and 132 characters wide, use a font size of 8 and landscape orientation.</p>
	Print Remote	<p>Prints the report to a printer that is accessible from the Colleague host computer. This option uses the Colleague host operating system to print the report, without downloading it to your computer.</p>



**Technical Tip:** Most PDF readers will scale a PDF document to fit the printer margins defined by the printer's print driver. If you are printing a document that requires a specific font size when it is printed, then you can compensate for this scaling when exporting the PDF. See AnswerNet page 8620 for more information.

# Accessing Multiple Environments

When your Colleague System Administrator installs UI 4.3, each installation is specific to one Colleague environment. Your administrator will provide you with the web address (URL) for accessing each environment that is set up for use with UI 4.3.

If you need to access a specific Colleague environment with UI 4.3 and do not have connection or login information, see your Colleague System Administrator.

# Keyboard Shortcuts

This section lists the keyboard shortcuts that you can use with UI 4.3.

The shortcuts listed below are available in UI 4.3 when you are *not* working within a UI form:



**Note:** Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

- Change focus to search box (toggles between Person and Form search): **Ctrl+Shift+S**
- Show Search Results panel: **Ctrl+Alt+R**
- Show Clear History dialog box: **Ctrl+Alt+T**
- Show Advanced Person Search dialog box: **Ctrl+Alt+A**
- Show Navigation Panel: **Ctrl+Alt+N**
- Show Favorites Panel: **Ctrl+Alt+F**
- Exit/Logout: **Ctrl+Alt+L**
- Show Debug Information: **Ctrl+Alt+B**
- Show Help (for current UI area in focus): **Ctrl+Alt+H**
- Show Keyboard Shortcuts: **Ctrl+Alt+K**
- View all records in Context Area (card selector drop-down): **Ctrl+Shift+A**
- Map current record in Context Area: **Ctrl+Shift+M**
- Map all records in Context Area: **Ctrl+Alt+M**
- Close current record in Context Area: **Ctrl+Shift+X**
- Close all records in Context Area: **Ctrl+Alt+X**
- Add current record in Context Area to Favorites: **Ctrl+Shift+V**
- Add all records in Context Area to Favorites: **Ctrl+Alt+V**
- Go to next record in Context Area: **Ctrl+Shift+N**
- Go to previous record in Context Area: **Ctrl+Shift+R**
- Open Copy Window for current card in Context Area: **Ctrl+Shift+C**
- Close open panels (and return to the main UI window): **Esc**

The keyboard shortcuts listed below are available only when working *within* a UI form (alternative keystroke combinations are separated by | ). Most of these commands are also accessible with the mouse from the **Options** menu.



**Note:** Some of these shortcuts may not work in all browsers. Browser plug-ins or other applications may override these shortcuts and activate different commands.

- Move to the next field: **Tab**
- Move to the previous field: **Shift+Tab**
- Open a drop-down list to select a value: **Down Arrow**
- Scroll through the values in a drop-down list: **Up/Down Arrow**
- Select the highlighted value in the drop-down list: **Enter**
- Move forward one row in a table: **Down Arrow \***
- Move back one row in a table: **Up Arrow \***
- Move forward one page in a table: **Page Up**
- Move backward one page in a table: **Page Down**
- Move to the previous form: **Ctrl+Page Up** (Windows) | **Command+Page Up** (Mac)
- Move to the next form: **Ctrl+Page Down** (Windows) | **Command+Page Down** (Mac)
- Move to the beginning of the current field: **Home**
- Move to the end of the current field: **End**
- Move to the first row of a table: **Ctrl+Home**
- Move to the last row of a table: **Ctrl+End**
- Field insert in a table: **Insert**
- Field delete in a table: **Ctrl+Alt+D**
- Cancel from current form: **F8**
- Cancel from all forms: **Shift+F8**
- Finish from current form: **Ctrl+F9** (Windows) | **Ctrl+9** (Mac)
- Save current form: **F9** | **Ctrl+0** (zero, not the letter o)
- Save all open forms: **Shift+F9** (Windows) | **Ctrl+8** (Mac)
- Detail: **F2**
- Print active form: **Ctrl+Alt+P**
- Help: **Ctrl+Alt+H** | **F1** (shows help for area currently in focus; **F1** may not work in all instances)
- Change focus to UI Form Menu Bar (then use tab and arrow keys to access menu items): **Ctrl+U**
- Show Keyboard Shortcuts: **Ctrl+Alt+K**

\*If the current field within a table has a drop-down list, use **Down Arrow** to open the list, **Up/Down Arrow** to move up and down within the list, and **Ctrl+Up** or **Ctrl+Down** to move back or forward one row within the table from that field.

# Using UI 4.3 Without a Mouse

Most of the UI 4.3 features can be accessed with either a mouse or a keyboard. If you are a keyboard-intensive data entry user, you should be able to navigate a form and access most of the data-entry-related features using the keyboard rather than switching back and forth between the keyboard and mouse.

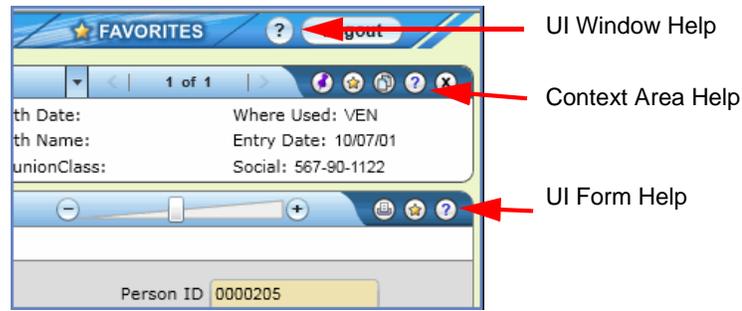
If you are a keyboard-intensive data entry user, keep the following points in mind:

- Study and learn the keyboard shortcuts shown in [“Keyboard Shortcuts” beginning on page 76](#). Be aware that some of these shortcuts are different between Mac and Windows computers. If you happen to use both types of computer, familiarize yourself with both. You can access the keyboard shortcuts when working with Colleague by pressing **Ctrl+Alt+K**. If you are on a Windows computer, only the Windows version of the keyboard shortcuts is shown when you access the list of keyboard shortcuts. If you are on a Mac computer, only the Mac version is shown.
- Not all menu options have a shortcut. However, you can still access all menu items using the keyboard. Press **Ctrl+M** to access the menu bar, then you can use the arrow keys to highlight the menu item you want, then press **Enter** to select it.
- Some UI features that are not critical to data entry do not have shortcuts. For example, the controller that lets you page through a table within a UI form does not have a keyboard shortcut for exporting to Excel or for sliding the controller left or right if it is blocking your view of another field. However, keyboard shortcuts do exist for paging through the rows, columns, and pages of a table.
- For validated fields (ones with a drop-down to select a predetermined value) *within a table*, you need a way to access and select an item from the drop-down list in addition to a way to move to the next row. Normally, the up or down arrow moves to the previous or next row of a table, but for fields with drop-down lists, the down arrow key opens the drop-down list. When the list is opened, you can use the up and down arrow keys to scroll through the list and select a value. However, if you are on a validated field within a table, press **Ctrl+Down** or **Ctrl+Up** to move to the next or previous row.

## Viewing Online Help in UI 4.3

Online help provides you with detailed information about areas of the UI 4.3 interface or Envision forms. A question mark icon is available on most UI 4.3 areas, such as the Context Area, **Search Results** panel, **Navigation** panel, **Favorites** panel, and dialog boxes. Within a UI form, the traditional process, field, and how-to help is available for the form from either the **UI Form Help** icon or from the **Help** menu.

**Figure 45:** Accessing Online Help in UI 4.3

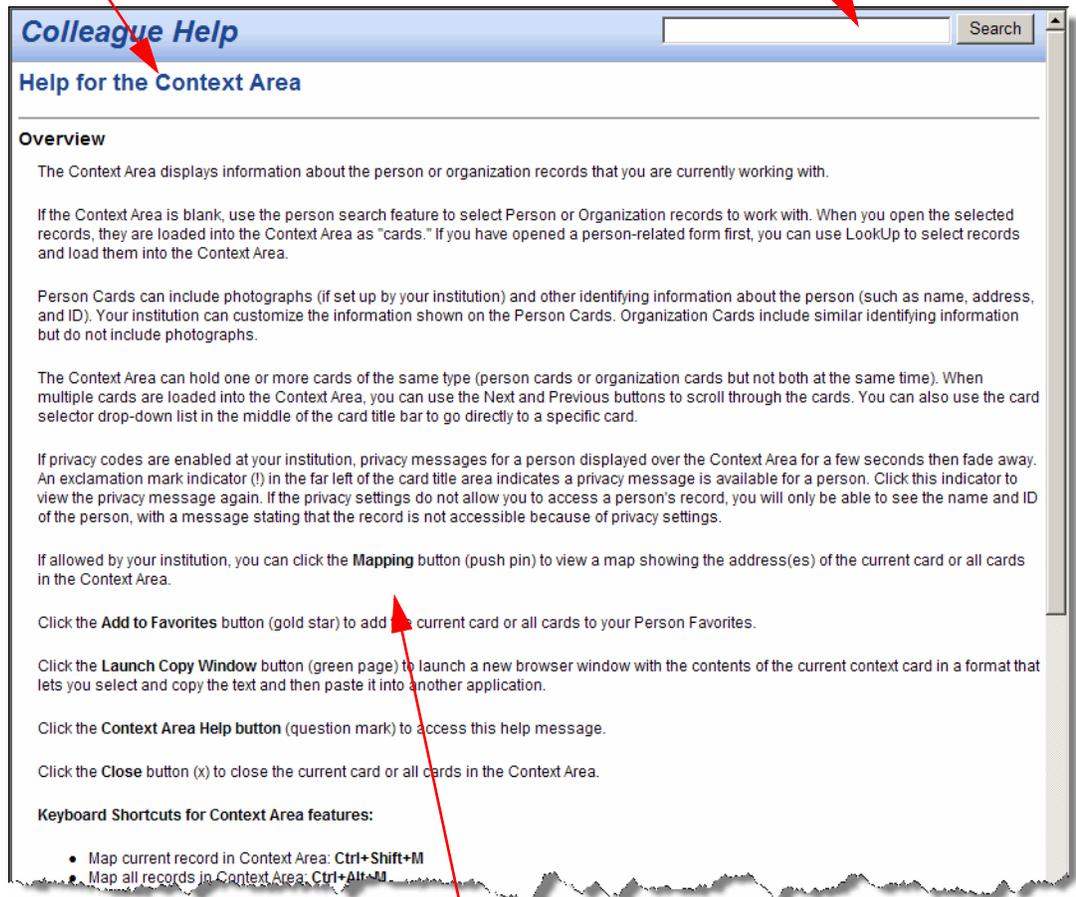


[Figure 46](#) shows an example of the help available for UI 4.3 areas such as the Context Area or Search Results panel.

Figure 46: Example UI 4.3 Context Area Online Help

The title of the help page indicates the UI Area for this help topic.

The help **Search** text box lets you search for information in manuals (PDF files) and Tech Doc Online.



For all UI Area help topics, a single page of information specific to the UI Area is shown.

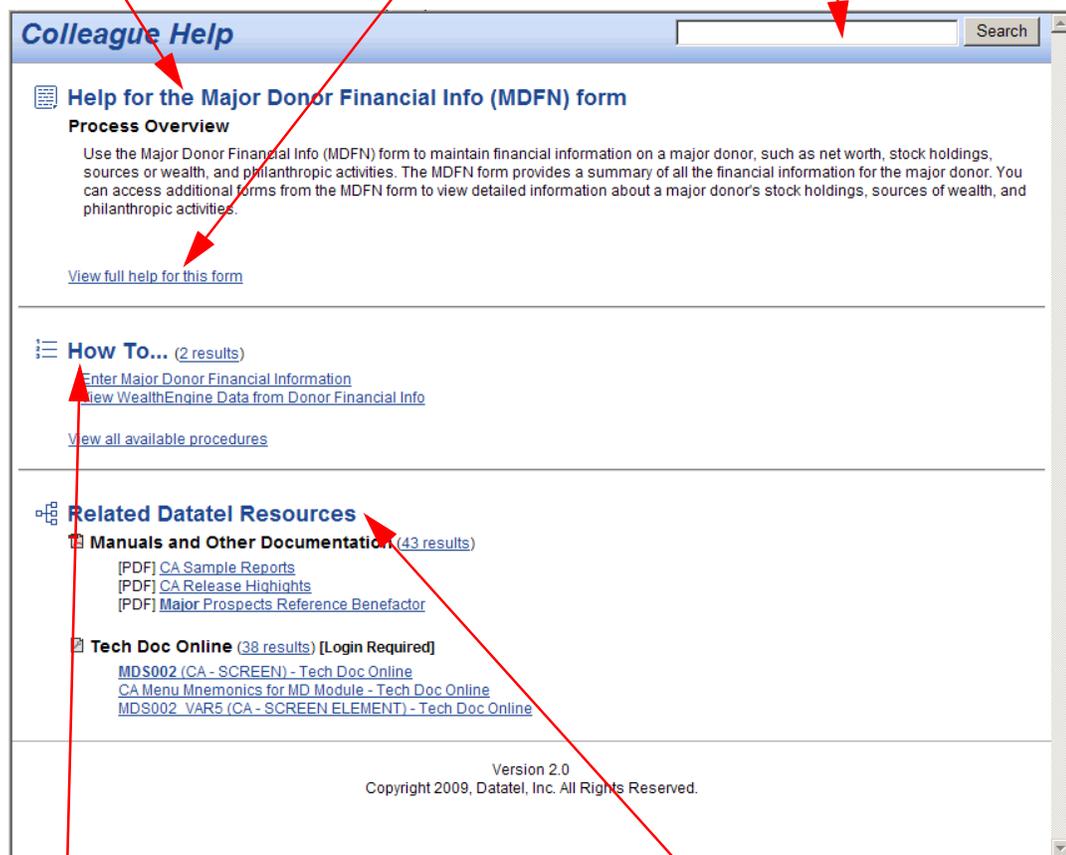
Figure 47 shows an example of the online help available for a UI Form. Contact your system administrator if the format of your help is displayed incorrectly.

Figure 47: Example of UI Form Help

The title of the help page indicates the UI Form for this help topic.

Process and field help for the current form is available in this section of the help page. Select **View all help for this form** to see all process and field help for the current form.

The help **Search** text box lets you search for information in manuals (PDF files) and Tech Doc Online.



Online procedural help topics relevant to this UI form are listed in this section of the help page.

PDF files and Tech Doc Online pages relevant to this UI Form are listed in this section of the help page.

# Customizing UI 4.3

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## In This Chapter

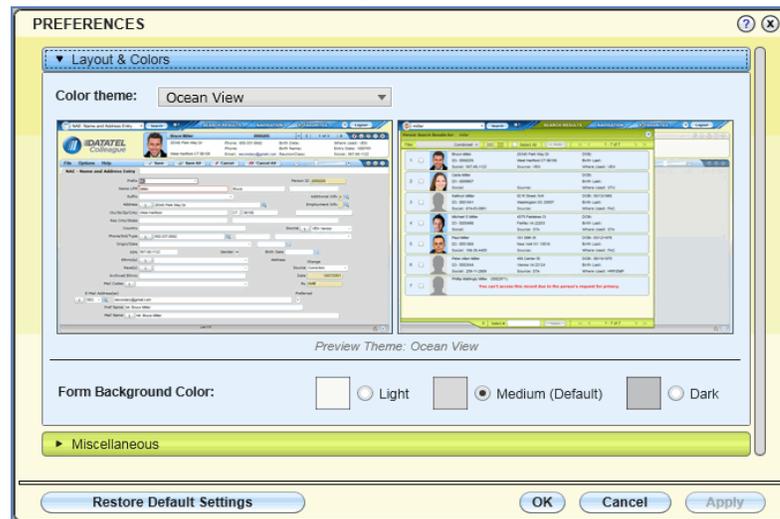
This chapter helps you learn how to customize the look and feel of User Interface 4.3 with Colleague. It includes instructions for defining user preferences, setting Favorites, and customizing the field sequence for Colleague forms.

# Defining User Preferences

Many personal preferences for UI 4.3 can be set on the **Preferences** dialog box (see [Figure 48](#)). Changes to these preferences apply to your user profile only.

To access the **Preferences** dialog box, select **Options > Preferences** from the menu bar.

**Figure 48:** Preferences Dialog Box



Click on the **Layout** section header to expand it and view or change the following:

- **Color Theme.** Select one of the available color themes. A preview of the color theme is shown.
- **Form Background Color.** Select one of the available background colors for UI forms.

Click on the **Miscellaneous** section header to expand it and view or change the following:

- **Display Person Photos.** If person photos are enabled at your institution, you can turn them on or off here for your own user profile.



**Note:** If photos are disabled at your institution, or if your security settings do not allow access to photos, then changing this option has no effect on your ability to see photos.

- **Number of Search Results Per Page.** When search results are displayed, you can define how many results are included on a page. Adjust this number to avoid having to scroll within the **Search Results** panel to see an entire page of results. The Card View setting applies only to person search results (card view).
- **Bar Graph.** The bar graph shows status information for batch and report processes. See [“Running Batch and Report Processes” beginning on page 68](#) for more details about this feature. To have this dialog box close automatically when a batch or report process is complete, select the **Automatically Close When Finished** option.

You can restore all default settings by clicking **Restore Default Settings**. Click **Apply** to save your changes but keep the **Preferences** dialog box open. Click **Cancel** to discard your changes and close the **Preferences** dialog box. Click **OK** to save your changes and close the **Preferences** dialog box.

If you are using UI 4.3 through the Datatel Portal, the **Modify Your UI Single Sign-On Credentials** link is available. Click this link if your UI 4.3 sign-on credentials change and you need to reset them for single sign-on access through the portal.

# Adding and Accessing Favorites

You can use the Favorites feature to save forms and person records that you use frequently to the Favorites panel, so that you can access them quickly.

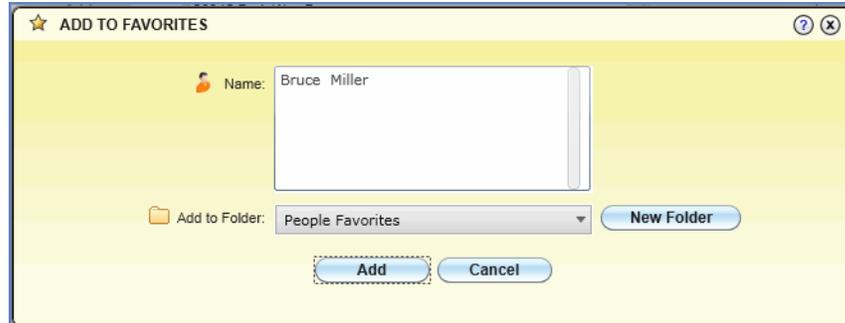
## Adding Favorites

Use the **Add to Favorites** feature to add the current form or people to your list of Favorites.

You can access the **Add to Favorites** dialog box (see [Figure 49](#) for an example of the Add Person to Favorites dialog box) by clicking the **Star** icon in the UI form area, the Context area, or in the Favorites panel, or by using one of the following keyboard shortcuts:

- Add current person in Context Area to Favorites: **Ctrl+Shift+V**
- Add all person records in Context Area to Favorites: **Ctrl+Alt+V**

**Figure 49:** Add Person to Favorites Dialog Box



Complete the following fields on the **Add to Favorites** dialog box to add items to your list of Favorites:

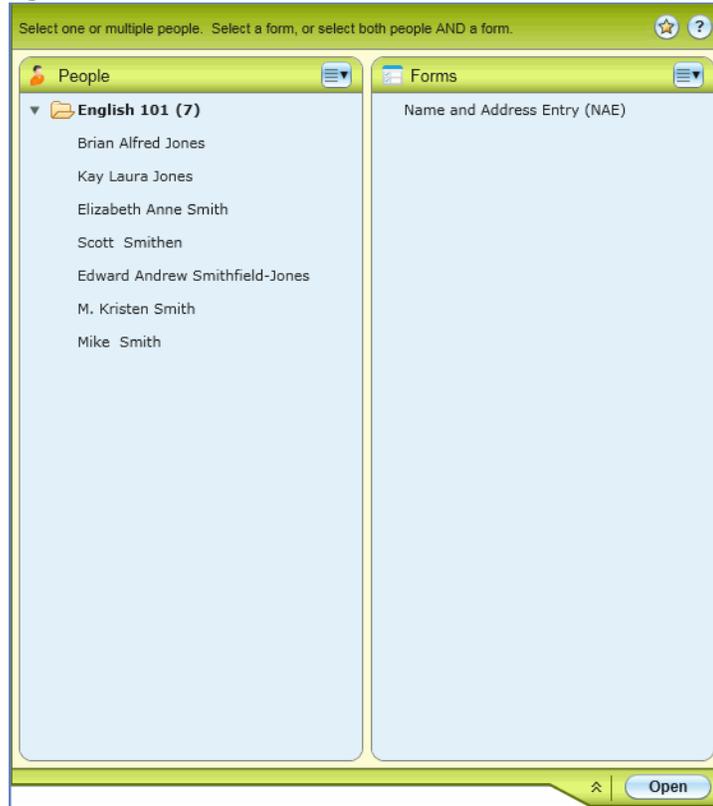
- **Name.** Shows the name of the person (one or more) or the form (only one) that you have selected to add to Favorites.
- **Add to Folder.** Select an existing folder from the drop-down list, or click **New Folder** to create a new folder for the selected items. You can create nested folders if needed.
- Click **Add** to add the listed items to the selected Favorites folder.
- To view and manage your existing Favorites, click the **Favorites** tab at the top of the UI window to open the Favorites panel.

## Accessing Favorites

Use the **Favorites** panel to retrieve and manage saved People, if allowed, or Forms Favorites.

You can access the **Favorites** panel by clicking the **Favorites** tab at the top of the UI window or by using the keyboard shortcut: **Ctrl+Alt+F**.

Figure 50: Favorites Panel



### Selecting People (if allowed) from Favorites

If allowed, to select one person from Favorites, navigate through the folders to locate the person record that you want to work with.



**Note:** To expand a folder, click the triangle to the left of the folder name. Double-clicking a folder name will add all person records in that Favorites folder to the Context Area.

Click the record to highlight it, and then click **Open** to add that person's record to the Context Area. You can also double-click a record to open it.

To select multiple people from Favorites, navigate through the folders and locate the person records that you want to work with. Use **Shift+Click** to highlight a continuous group of records. Use **Ctrl+Click** to highlight multiple records that are not in a continuous list. When using **Ctrl+Click**, you can click again on a highlighted record to cancel that selection. Click **Open** to add all highlighted people records to the Context Area.

To retrieve an entire folder of people records from the **Favorites** panel, highlight the folder name, and then click **Open** to add all records in that folder to the Context Area. You can also double-click a folder name to add all records in that folder to the Context Area.



**Note:** To expand a folder, click the triangle to the left of the folder name.

### **Selecting a Form from Favorites**

You can select only one form at a time from the **Favorites** panel. Navigate through the folders to locate the form you want. Click the form to highlight it, and then click **Open**.



**Note:** To expand a folder, click the triangle to the left of the folder name.

### **Selecting People (if allowed) and Forms Together from Favorites**

From the **Favorites** panel, you can select one or more people records and a person-related form at the same time. Highlight the people records you want to work with, and then highlight the form you want to use. Click **Open**. The people are added to the Context Area, and the form is opened with the first person's information loaded in.



**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.

### **Managing Favorites**

From the **Favorites** panel, you can drag items from one folder to another. You can also drag entire folders to different levels within the folder structure.

In the upper right corner of the **People Favorites** area and the **Form Favorites** area, there is an **Options** button with a drop-down list of available options. Use these options to manage your Favorites:

- **Create Shared List** (available only from the **People Favorites Options** button). Use this option to create a shared list of people records (stored as a

saved list in Colleague). See “[Creating a Shared List from Favorites](#)” on page 90.

- **Recently Created Shared List.** Use this option to view the last ten recently created shared lists.
- **Collapse All.** Use this option to collapse all Favorite People or Form folders.
- **Expand All.** Use this option to expand all Favorite People or Form folders.
- **Rename.** Use this option to edit or rename a folder or item in your list of saved people or forms. Highlight the folder or item you want to rename, and then select **Rename** from the **Options** button drop-down menu to edit or rename the selected item.



**Note:** This option does not change the name of the person or form in Colleague. The item is renamed only in your Favorites.

- **Remove Selected.** Use this option from the People Favorite **Options** button to remove one or more people or people folders from your Favorites. Use this option from the Form Favorite **Options** button to remove one or more forms or form folders from your Favorites. Select the items you want to remove, and then select **Remove Selected** from the **Options** button drop-down menu to remove them from your Favorites.

### ***Creating a Shared List from Favorites***

Follow these steps to create a shared list of people records from existing People Favorites. For example, if you create a list of students that is the definitive list of students in the class of 2010, you can share it with other users who need to work with the same list of students. The shared list ensures that everyone works with the same group of people, and each user does not have to create his or her own list individually.

**Step 1.** Select one or more people from your Favorites, or a folder of people.

**Step 2.** From the **People Favorites** area of the **Favorites** panel, open the **Options** button and select **Create Shared List**. The **Create Shared List** dialog box appears (see [Figure 51](#)).

**Figure 51:** The Create Shared List Dialog Box



**Step 3.** Complete the Shared List dialog box as follows:

- a. **Shared List Items:** Shows the names of the people selected from your Favorites that will be stored in the shared list that you are about to create.
- b. **Shared List Name:** Enter the name to use for the shared list. This list is stored as a saved list in Colleague. Be sure 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 prompted whether to overwrite it. The saved list name is stored in all uppercase letters, regardless of the case used when creating the name. Click the **Recently Created Shared Lists** link to view the last ten recently created shared lists.

**Step 4.** Click **Create** to create the shared list and exit the **Create Shared List** dialog box. The shared list is created in Colleague as a saved list.

**Step 5.** You or any other user in this Colleague environment can retrieve an existing shared list from the **Advanced Person Search** dialog box (see “[Advanced Person Search](#)” beginning on page 45 for more information). When another person retrieves this shared list, privacy settings and record security are applied to ensure that the user does not access restricted information.

# Customizing the Field Sequence and Properties for a Form

The behavior for each field on each form is originally defined by Datatel. The system administrator at your institution can use Colleague Studio to further define and customize field behavior. If allowed, you can also modify certain field behaviors for the forms that you access.



**Note:** Before you can customize fields for a form, your Colleague System Administrator must first enable the field customization features for you and set up your field customization preferences.

You can use field customization to determine the tab sequence of fields on a form. Customizing your field sequence can help you move through a form more quickly than you would if you had to tab through each field on the form. You can specify the field you want to start in first, the order in which to visit each subsequent field, and the last field to complete before updating from the form. Each time you press the Tab or Enter key, you move to the next field in the specified tab sequence (skipping any fields not in the tab sequence). If you specify a last field, the form updates when you tab from the last field in your customized tab sequence. If tab sequencing is not specified, the default sequence is used.

Use the **Customize Field Sequence & Properties** dialog box (available from the **Options** menu) to specify field sequence and field access for fields on the current form (see [Figure 52](#)). The example in [Figure 52](#) shows field customization properties for the NAE form. Any form can be customized if you are allowed to customize the field properties.

The **Customize Field Sequence & Properties** dialog box includes the following options for customization:

- **Field Sequence.** Lets you can specify a first field, last field, and next field for tab sequence.
- **Field Access.** Lets you specify which fields on the form are Required, Inquiry Only, or No Access.

When you access the **Customize Field Sequence & Properties** dialog box for a form, a series of “tool tips” indicates the field identifier number and tab sequence of each field. Tool tips are the numbered boxes displayed on each field when you open the **Customize Field Sequence & Properties** dialog box. Field identifier number tool tips are shown in yellow boxes, and tab sequence tool tips are shown in orange boxes. A green tool tip for a field indicates that the field properties are customized for that field.

See “Procedure for Customizing Fields on a Form” beginning on page 95 for the procedure for customizing the field sequence for a form.

Figure 52: Customize Field Properties Dialog Box for the NAE Form

Example of field identifier number tool tip (yellow tool tip)

Example of tab sequence number tool tip (orange tool tip)

The **Customize Field Properties** Dialog Box

Example of customized tool tip (green tool tip)

## Limitations on Customizing Field Properties

### Field Sequence Customization Limitations

The behavior for each field on each form is originally defined by Datatel. System administrators can use Colleague Studio to further define field behavior for an institution. You cannot take away behavior that is already defined for fields on a form. The following rules apply when customizing field sequences:

- **Precedence**
  - Tab sequence precedence is exclusive. If your Colleague System Administrator creates a tab sequence and applies it to some or all users, you can still create a different tab sequence for yourself (if allowed), and that tab sequence will apply only to your login ID.
- **First Field**
  - You can make only one field first in the sequence. Therefore, if another field has already been specified as the form's first field, locate that field and clear the selection.
- **Last Field**
  - You can specify more than one field as the last field on a form. However, when specifying a field as last, you cannot also select a next field override.
- **Next Field Override**
  - If a field is specified as last, you cannot select a next field override.
  - Other fields that cannot have a next field override include:
    - Fields contained in the header area.
    - Table fields that are not table controllers (unless the current field is a member of the same table).

## Field Access Customization Limitations

When customizing the field access properties, you cannot take away behavior that either Datatel or your system administrator has already defined for the fields on a form. For example, if a field is defined as Required, it is always required and cannot be changed to Inquiry Only or No Access. However, a standard (not required) data entry field can be customized as required.

### ■ Precedence

- Field access precedence is inclusive. If your Colleague System Administrator restricts field access from a field for all users, you cannot customize the field access properties to allow access to that field for yourself.

### ■ Field Access

- Fields appearing in the form's header area can only have No Access restrictions applied to them. Only the visible fields in the header area can be set to No Access.
- You can only apply one field access restriction (Required, Inquiry Only, or No Access) to a field.
- If a field is already specified as *required*, you cannot modify any of the access options.
- If a field is already specified as *no access* by Envision security, you cannot modify any of the access options.
- If a field is already specified as *inquiry-only*, your only available field access customization option is to specify the field as *no access*.

## Procedure for Customizing Fields on a Form

This procedure assumes that your Colleague System Administrator has provided you with the ability to customize field properties for Colleague forms. If you do not have access to this feature, see your Colleague System Administrator.

**Step 1.** Access the form that you want to customize.

**Step 2.** From the **Options** menu, select **Customize Field Sequence & Properties** to display the **Customize Field Sequence & Properties** dialog box (see [Figure 53](#)). When the dialog box is displayed, the tool tips on the current form are also displayed.

Figure 53: The Customize Field Properties Dialog Box



**Step 3.** In the **When I am on field** drop-down list, select the number of the field you want to modify. Refer to the field identifier tool tips displayed on the form to select the number of the field you want to modify.

**Step 4.** Indicate the field sequence customization you want to apply to the field.

- To set a field as first in the form, select the appropriate field number from the **When I am on field** list and then select the **Make this the first field on the form** check box. When entering the form, the cursor will appear in this field, which is the first field in the form's tab sequence.
- To set a field as last in the form, select the appropriate field number from the **When I am on field** list and then select the **Make this the last field on the form** check box. This is the last field in a form's tab sequence, which means the form will update and you will leave the form after you leave this field.
- In the **The next field should be** list, you can specify where the cursor should move when leaving the field currently selected in the **When I am on field** list. If you do not select a field override from this list, the next field in the default tab sequence is used. For example, if you want to enter data into field 10 on a form then move directly to field 15, select **10** from the **When I am on field** list, and then select **15** in this list. Refer to the field identifier tool tips displayed on the form to select the number of the field you want to modify.

**Step 5.** Indicate the level of field access that you want to apply to the selected field.

- Select the **Required** check box to ensure that the field currently indicated in the **When I am on field** list is completed before finishing from the selected form.
- Select the **Inquiry Only** check box to make the field currently indicated in the **When I am on field** list non-editable. This option lets you view data in this field, but you cannot update or delete data.
- Select the **No Access** check box to prevent viewing, adding, changing, or deleting data from the field currently indicated in the **When I am on field** list.

Review the “[Field Access Customization Limitations](#)” on page 95 for an explanation of which options are available for each field. Any changes made that violate the customization limitations will appear to be saved, but these changes will not be honored.

**Step 6.** Repeat steps 3 through 5 for each field that you want to customize.



**Note:** You do not need to click **Save** after customizing each field. You can click **Save** after making customizations to all of the fields on a form to apply all of the customizations. Clicking **Save** will save all changes and exit the dialog box.

Click **Clear This Field** to remove customizations for the currently selected field and return to the default settings. Customizations for all other fields on this form are left unchanged.

Click **Clear All Fields** to remove all existing field customizations for the current form and return to the default settings.

**Step 7.** Click **Save** when you have finished your field customization settings to save all changes and exit the dialog box. Test your field customizations and adjust them as needed until the form behaves the way you expect it to. You must close and then reopen the form you have customized to test it.

**Step 8.** If allowed by your institution, you can copy the current customizations to a specific set of users. Click the **Copy to other users** link and select the users from the list to whom you want to copy the current set of customizations. After selecting the users, click **Copy** and then **Save** to submit the customizations to those users and exit the **Customize Field Sequence & Properties** dialog box.

Users listed in bold red text have existing customizations. Copying customizations to users will overwrite any existing customizations that those users have defined. Additionally, copying does not establish a permanent link; therefore, further changes made after copying will not be reflected for those users.

## Procedure for Disabling Field Sequence

After you set up custom field sequencing, there may be a situation where you need to temporarily disable your customizations. Follow this procedure to disable and then re-enable your field sequence customizations. This feature

disables only your own customizations. If your Colleague System Administrator has customized this form for all users, those customizations can not be disabled.



**Note:** This option does not disable field access level customizations.

**Step 1.** Access the form that you customized.

**Step 2.** From the **Options** menu, select **Disable Custom Field Sequence**. If this option is not selected, it indicates that the field customizations are in place. If this option is checked, it indicates that the field customizations are temporarily disabled. To temporarily disable the field customizations, make sure this option is checked.

**Step 3.** To re-establish your custom field sequence changes, clear the **Disable Custom Field Sequence** option.

## Procedure for Showing Field Sequence

You can display the current field sequence of the current form. The field sequence for each field is displayed as a number in the tool tip for that field. Any fields with customizations appear with green tool tips. The fields with default field sequence settings appear with orange tool tips.

**Step 1.** Access the form for which you want to see the field sequence.

**Step 2.** Select **Options > Show Field Sequence**. Tool tips appear for each field on the form. The number in each tool tip indicates its field sequence.

**Step 3.** To hide the tool tips showing the field sequence and return to the form, click anywhere on the form.