



## DATATEL: COLLEAGUE GETTING STARTED

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## DATATEL / COLLEAGUE

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Datatel was founded in 1968 and provided data processing. That was then. The product and company have been combined; remolded; reworked – until they became Ellucian: Colleague.

Colleague is a fully integrated student management system that provides secure, easy access to the information institutions need to manage assets more efficiently and allocate resources more effectively.

Data is collected from all facets of the college using various forms that will always be identified with either three or four letters. For instance all people would be added through the NAE (Name and Address Entry) and all vendors are added through the ORGP (Organization Profiles).

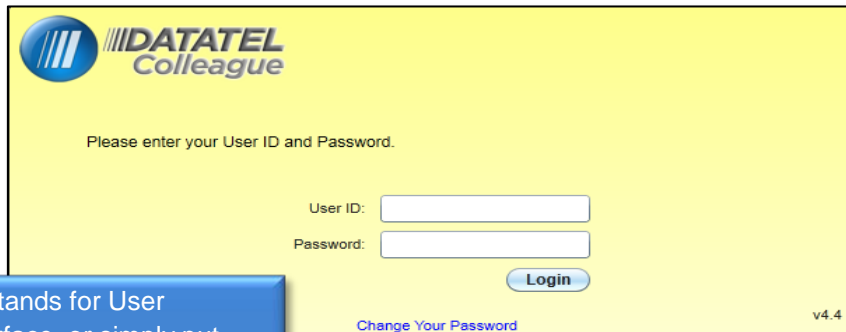


### WEB ADDRESS IS WEBUI.COM.EDU

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The web address for Ellucian Colleague web based user interface 4.4. is [webui.com.edu](http://webui.com.edu)

The login to will be the same as your network login ID and password.

A screenshot of the DATATEL Colleague login page. The page has a yellow background and features the DATATEL Colleague logo at the top left. Below the logo, the text 'Please enter your User ID and Password.' is displayed. There are two input fields: 'User ID:' and 'Password:'. Below the 'Password:' field is a blue 'Login' button. At the bottom of the page, there is a link for 'Change Your Password' and the version number 'v4.4'.

UI stands for User Interface, or simply put, "...the means in which a person controls a software application or hardware device." (TechTerms.com, 2009)

## NAVIGATION

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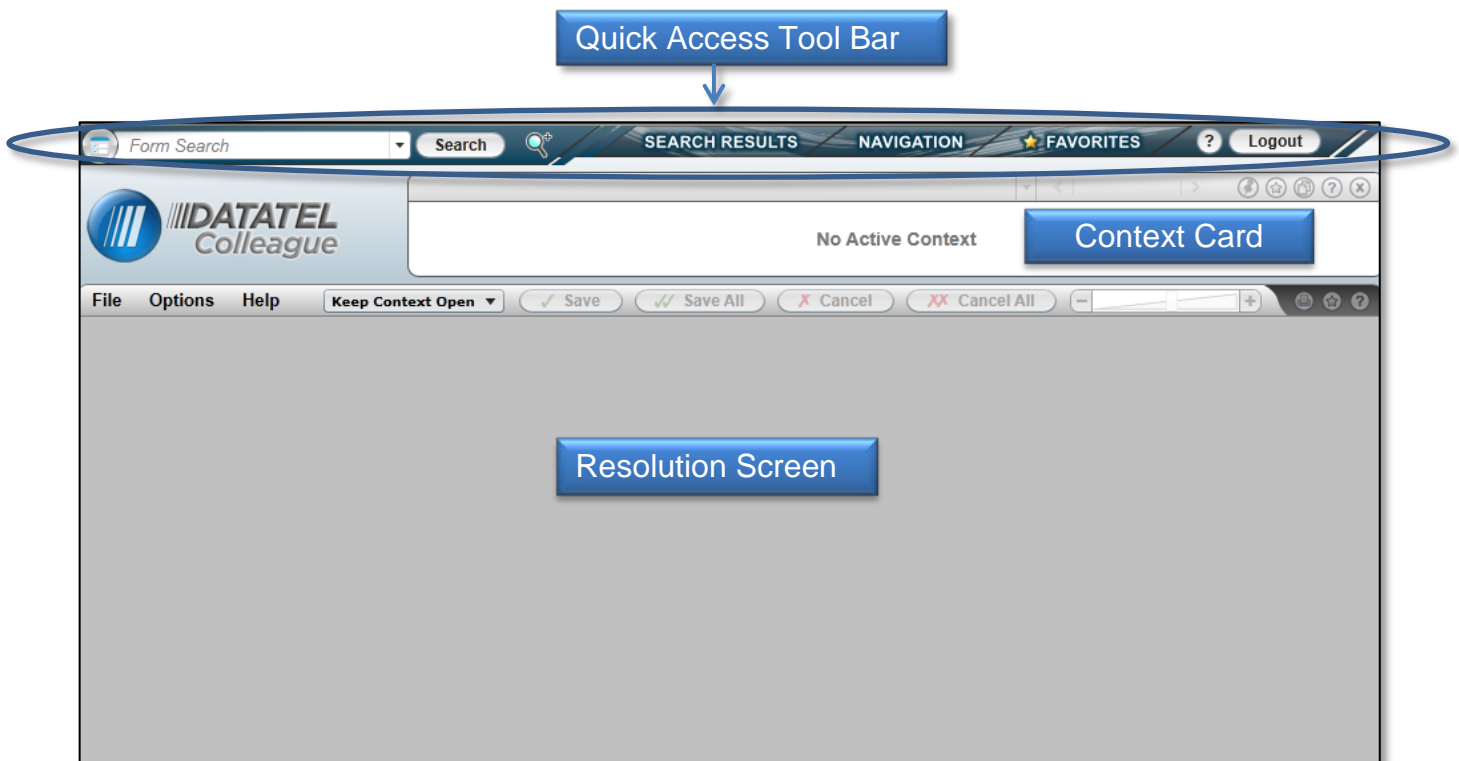
The new interface has three distinct sections, each with its own tool bar and help guide.

**Quick Access Tool Bar:** the top most bar across the interface is constant through all process and procedures.

**Context Card:** located directly below the Quick Access Tool Bar will give basic information about an individual and will not lock up their record and you will be able to hyper-link to their preferred e-mail. Additionally you will be able to stack several records with the ability to flip from record to record as well as save a person or groups of people to a favorites search group.

**Resolution screen:** shows the results of a search or the requested form.

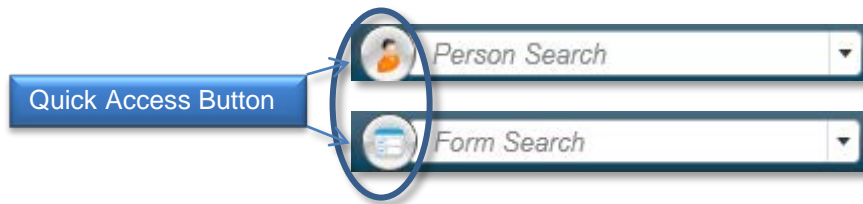
The help guide is always designated in the tool bar with a question mark.



## QUICK ACCESS TOOL BAR

### Quick Access Button

Click on the quick access button to toggle between a person search or a form search.



Click on the magnifying glass beside the form search field for an Advanced Person Search.


Two ways to view search results: Card View and Grid View



#### Card View

Person Search Results for: .LIST MEC\_WILLISTEST (PERSON)

Filter: Form-less Person Search

1		Austin Michael Willis ID: 0196347 Social: 880-19-6347	1614 Thunderbay Houston TX 77062 Source: Where Used: PER	DOB: 01/11/1973 Birth Last:
2		Bandit B Willis ID: 0196345 Social: 880-19-6345	1614 Thunderbay Houston TX 77062 Source: Where Used: PER	DOB: 01/01/1971 Birth Last:
3		Connor Willis ID: 0196346 Social: 880-19-6346	1614 Thunderbay Houston TX 77062 Source: Where Used: PER	DOB: 01/11/1972 Birth Last:

#### Grid View

Person Search Results for: .LIST MEC\_WILLISTEST (PERSON)

Filter: Form-less Person Search

#	Name	ID	Social	Address Line	Address CSZ	Source	DOB	Birth Last	
1	Austin Michael Willis	0196347	880-19-6347	1614 Thunderbay	Houston TX 77062		01/11/1973		P
2	Bandit B Willis	0196345	880-19-6345	1614 Thunderbay	Houston TX 77062		01/01/1971		P
3	Connor Willis	0196346	880-19-6346	1614 Thunderbay	Houston TX 77062		01/11/1972		P
4	Sassy A Willis	0196344	990-19-6344	1614 Thunderbay	Houston TX 77062		01/01/1971		P



In the Person Search Results screen, view and or select one or more individuals. In the **card view** click in the white square box left of the individual's picture box or click in the Select All button if you want the entire list.

#### Select All

#### Individual

Person Search Results for: .LIST MEC\_WILLISTEST (PERSON)

Filter: Form-less Person Search

1		Austin Michael Willis ID: 0196347 Social: 880-19-6347	1614 Thunderbay Houston TX 77062 Source: Where Used: PER	DOB: 01/11/1973 Birth Last:
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4		Sassy A Willis ID: 0196344 Social: 990-19-6344	1614 Thunderbay Houston TX 77062 Source: Where Used: PER	DOB: 01/01/1971 Birth Last:

#### Select All

#### Individual

Person Search Results for: .LIST MEC\_WILLISTEST (PERSON)

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1	Austin Michael Willis	0196347	880-19-6347	1614 Thunderbay	Houston TX 77062		01/11/1973		P
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3	Connor Willis	0196346	880-19-6346	1614 Thunderbay	Houston TX 77062		01/11/1972		P
4	Sassy A Willis	0196344	990-19-6344	1614 Thunderbay	Houston TX 77062		01/01/1971		P

**FOR THE GRID VIEW ONLY!**  
Sort the list in ascending or descending order by clicking on the required column heading.

The **grid view** also has a Select All feature. However instead of a box to select the individual, click the left of the number. If you want to select several individuals hold down the CTRL key as you make the selections.

Open

Click the open button at the bottom of the search screen and the selections will populate the context box.

STAC  Search

The form search field can be used to find all the screens or mnemonics you normally use in the course of your job.

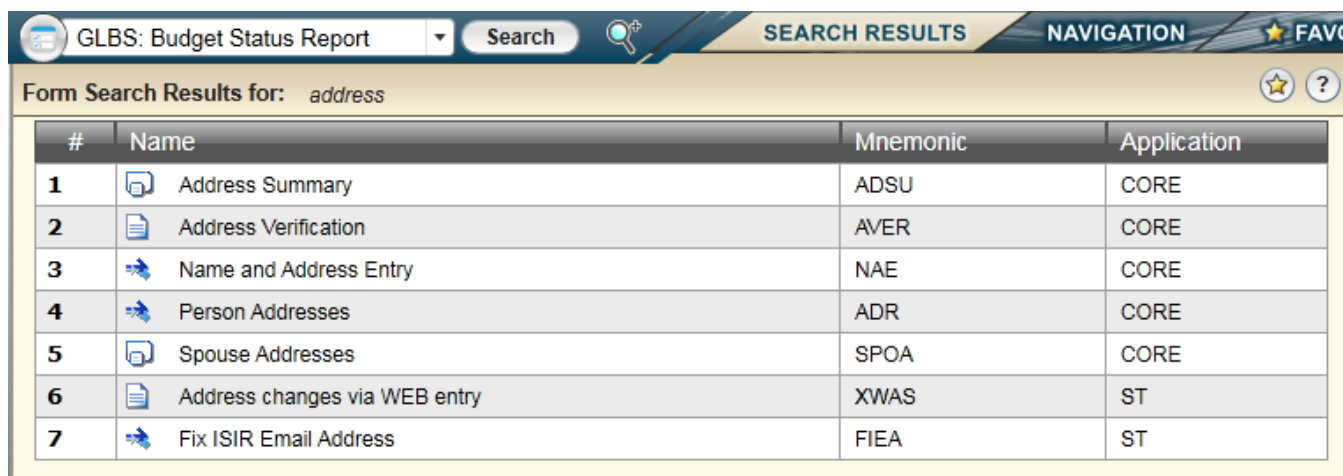
Additionally, the field can be used to *search* for a mnemonic you may have forgotten. **For instance:** you need to add a student to the system and cannot remember the proper form name, but do remember there is an address entry within the form. Type address in the form search field and click on search. Your results will only yield the forms associated with your security rights. You can use grid view to sort through result information.



#	Name	Mnemonic	Application
1	Address Summary	ADSU	CORE
2	Address Verification	AVER	CORE
3	Name and Address Entry	NAE	CORE
4	Person Addresses	ADR	CORE
5	Spouse Addresses	SPOA	CORE
6	Address changes via WEB entry	XWAS	ST
7	Fix ISIR Email Address	FIEA	ST

## SEARCH RESULTS

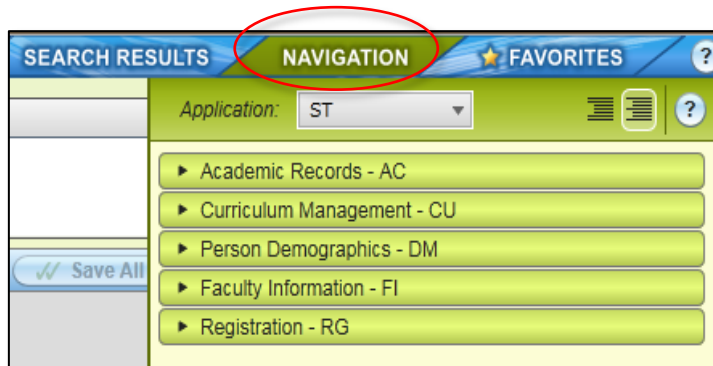
The Search Results tab will yield the listings from the last form search during the existing session of Colleague. Logging off will clear the information from the memory.



#	Name	Mnemonic	Application
1	Address Summary	ADSU	CORE
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## NAVIGATION

Clicking the Navigation tab will access the Colleague menu structure to view and access all applications and forms available to your security class. Click the down arrow beside the Application field to select either HR=Human Resources; CA=Colleague Advancement; CF=Colleague Financials; ST=Students; Core=all data resides here. You will only have forms associated with a specific security class and will only view data commensurate with your position.



SEARCH RESULTS **NAVIGATION** FAVORITES

Application: ST

- ▶ Academic Records - AC
- ▶ Curriculum Management - CU
- ▶ Person Demographics - DM
- ▶ Faculty Information - FI
- ▶ Registration - RG

Save All

## FAVORITES

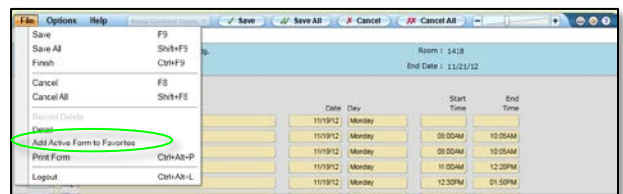
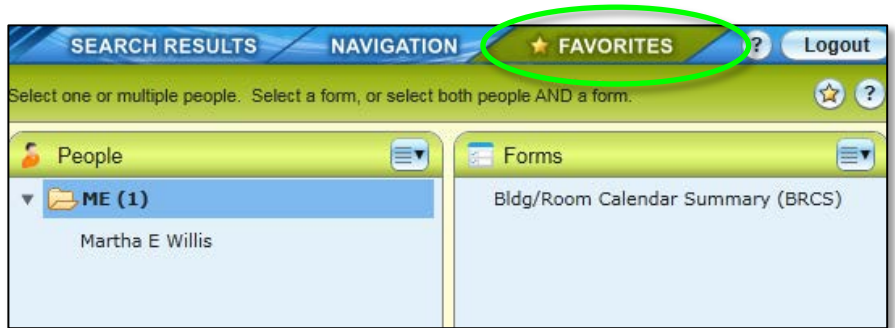
Click the Favorites tab to access all saved forms. Create a shared or saved list of groupings of individuals that can be used in other areas of colleague applications and share list with others in the office.

There are two types of favorites:

**People** – the drop down menu allows you to create shared lists, navigate through the various list, as well as keeping the menu updated. Save new list using the gold button in the Context area. Exciting features are available!

**Forms** – can be saved two ways. NOTE: the form MUST be active in the Resolution screen.

With the form open in the Resolution Screen click on File / Add Active Form to Favorites. OR



On the resolution screen menu bar click the small gold star. You will be given the option to organize the forms with the Favorites folder.

## LOGOUT

Please always Logout before closing Colleague. College of the Mainland has less than 100 'seats' available for log-in privileges across the campus. Not logging off properly will create a limbo effect for that 'seat' until the server releases it.

During peak times – EVERY SEAT COUNTS! Be good to our ... SEATS!

## CONTEXT AREA



The person search The Context area can hold one or more "cards." A card holds all the information about an individual that your security setting will allow to be viewed. The

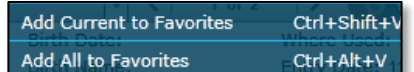
Context area can hold a large number of people or organizations and will not lock the file.

When there a number of cards loaded, you can use the next card or previous card arrows to scroll through each one or use the down arrow to see all the cards held in Context.



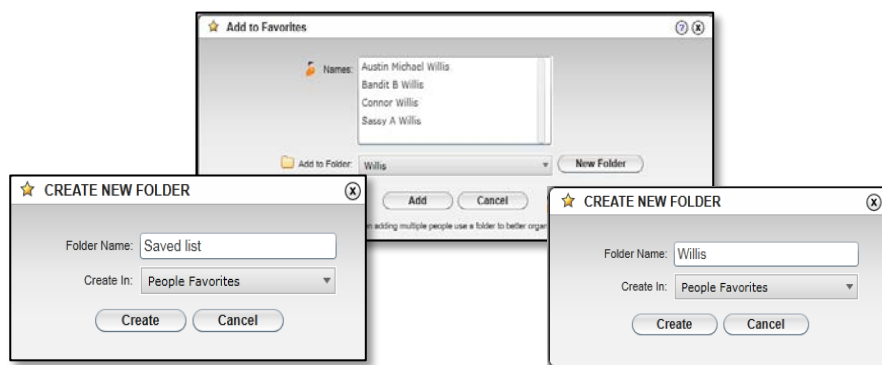
Create a saved list of individuals that can be used in other areas of colleague applications by clicking on the gold star button.

The option will be to either add the current card to the Favorites or add all the cards to the favorites.





Once in the Add Favorites menu selection you will be able to add directly to an established folder or create a new folder or Saved List.



Click on the Launch Copy Window button to open a new browser window with the contents of the current context card in a format that allows the text to be copied and pasted into another application. It is also possible to copy a single field directly from the resident context card without clicking on the Launch Copy Window.



## RESOLUTION SCREEN

Course Name	Title	Stat	Credits	CEUs	Term	Gr
1 TAKSM-0001	TAKS Math-2200	NC	0.00			
2 TAKSL-0001	TAKS Language-2200	NC	0.00			
3 TAKSE-0001	TAKS Essay-3	NC	0.00			
4 TAKSM-0002	TAKS Math-2400	NC	0.00			
5 TAKSL-0001	TAKS Language-2200	NC	0.00			
6 TAKSE-0001	TAKS Essay-3	NC	0.00			
7 SATM-0003	SAT Math 580-640	NC	0.00			
8 SATV-0007	Sat Verbal 500+	NC	0.00			

The resident context card, if applicable, will automatically populate the requested form in the Resolution Screen

Using the forward and backward buttons in the Context area will toggle between people allowing you to populate the Resolution screen with each individual's information.

## FUNCTIONALITY WITHIN THE FORM

A form will have fields that are either *yellow* = *inquiry only* or *white* = data entry.

Sometimes, you will be able to delete the content of the field with the keystroke Alt+Ctrl+D.

Delete a line of information by clicking on the number box beside the line. A box will appear with the text Select Table Operation to Perform, click the **Delete** button. A second dialog box will appear, click **Delete** button.



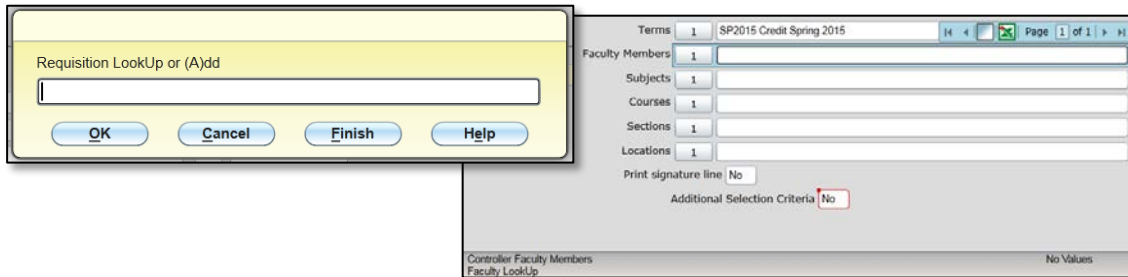
This icon, (found at the end of each field in the example), is called a drill down and will open either the next associated form – or will open a menu section of all associated forms with that field.

Advisor	Type	Start Dt	End Date	Acl
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				



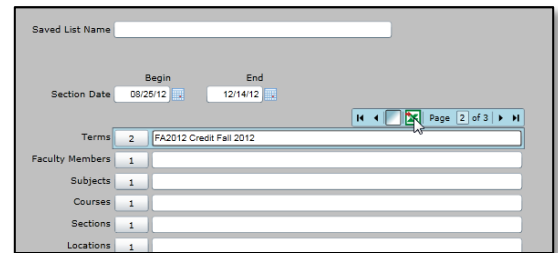
## LOOKUP

Some fields, in order to perform properly, require an exact string of data to create the inquiry. All data resides in the CORE and the word LookUp, in a dialog box or in the information pane, indicates a field that requires the exact string of characters from CORE. Access CORE by typing ... in the field.



## EXPORT

Click on the green x icon and it will export the data within the selected field to Excel.



## SAVE AND CANCEL

When you are ready to exit the resident form choose from one of the buttons located on the form menu bar. Save will save the single resident (on top) form; Save All will all open forms; Cancel will cancel the single resident (on top) form; Cancel All will cancel all open forms.

