DATATEL: COLLEAGUE GETTING STARTED
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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**

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.
NAVIGATION

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.
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

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.

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.

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

**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.

![Search Results Table](image)

**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.
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 by 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**

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+Ctl+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.
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.