

## Colleague User Interface 4.0- Basic New Features

- If you are new to Colleague, a [Colleague Account application \(blue form\)](#) needs to be completed, signed, and returned to the Finance Office in order for a username and password to be assigned to personnel needing access to Colleague.
- A Colleague UserID needs to be typed in UPPERCASE letters.
- Criteria for a Colleague password are the same as your WSC network password.

A password MUST be 8 characters in length and include 1 upper case letter + 1 lower case letter + 1 number. Passwords cannot contain any portion of your username or previous passwords.

Please contact the Information Technologies' Help Desk (IT website or 508.929.8856) if you have any questions. See also Timed Username/Password Expirations document on the IT website ( <http://it.worcester.edu> ).

### Logging Into Colleague

1. Double-click the **Datatel** icon on your Desktop or choose **Start>All Programs>Datatel** and select the displayed Datatel icon.

Colleague launches and a LOGIN screen displays.

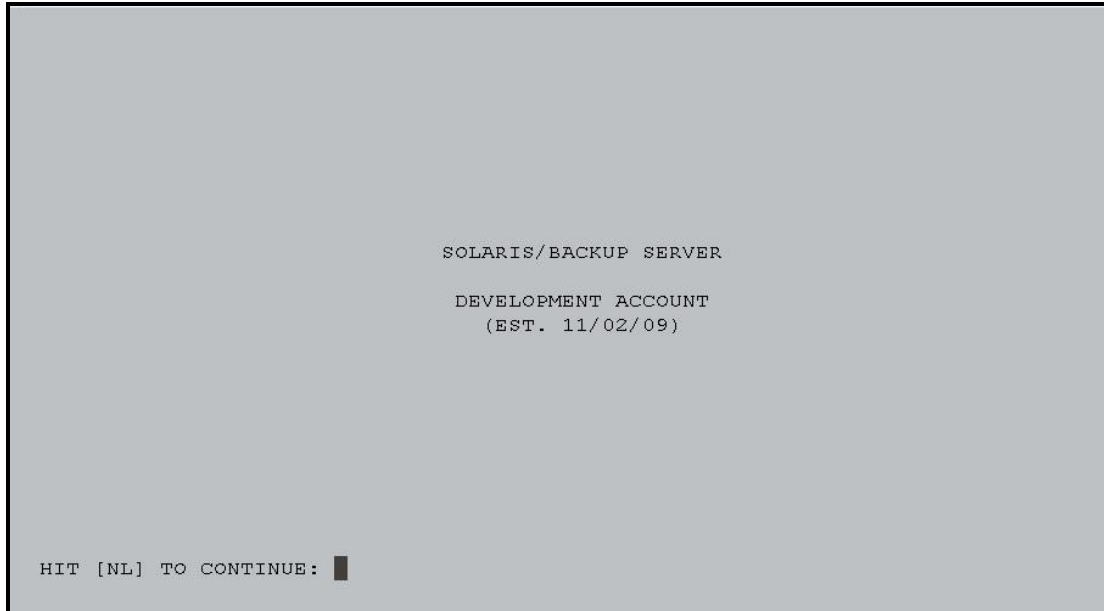


2. In the UserID box, type the **Colleague UserID** provided to you by Information Technologies.
3. In the **Password box**, type your Colleague password. Then, click the **LOGIN** button or press the **<Enter>** key.

A screen similar to the one at the top of the next page displays.

# Colleague User Interface 4.0- Basic New Features

## Logging Into Colleague (Continued)



4. If you see **HIT (NL) TO CONTINUE**, press the **<Enter>** key to proceed.

Colleague User Interface 4.0 opens.



## Colleague User Interface 4.0- Basic New Features

Data regarding students, staff, and faculty gets entered into our Colleague database when students apply for entrance to Worcester State College, register for classes, work or teach at the College, pay tuition, and for other necessary reasons. When the data needs to be viewed or modified, it is accessed by authorized members of the campus community.

The Search area allows searching for a person or a form. Once a search criterion is entered, all persons or forms matching the criterion display. Opened forms display data such as name, address, and phone number for the active person in the Context area. If more than one card is open, the Previous (<) or Next (>) arrows allow movement between open cards. Click the Advanced Search button to enter information for a more detailed search.



**Typing a significant part of the desired criterion helps narrow and speed up the search.**

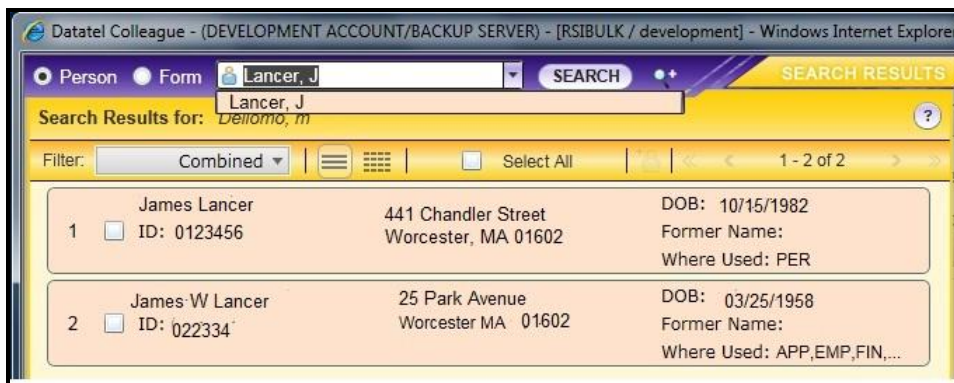
**For a Name search, enter at least 2 letters of the last name and 2 letters of the first name, separated by a comma (e.g., LA, JO to search for Joseph Lancer).**

**Search Results, Navigation, and Favorites tabs appear on the right-hand side of the Search Results for: area. The Navigation tab provides a means of visually locating desired forms (e.g. STSC). Clicking the down arrow to the left of a desired application group displays all available forms to which the user has been granted access permissions.**

### The Search Area – Opening a Person Card and Form

1. In the **Search** area, click the radio button (circle) to the left of **Person** to select it.
2. Type a Person's **Name** (Two letters of the Last Name, Two letters of the First Name, separated by a comma) or **Student ID#** in the Search box and click **Search** or Press <Enter>.

Person Cards that match requested search criteria display.



3. **Select** desired cards by **clicking inside the Select All box or white boxes to the left of each desired Person's ID #**. Then, click **Open** at the bottom of the screen or Press <Enter>. Selected cards open and become active by clicking the Previous (<) or Next (>) arrows.

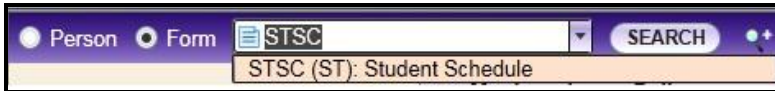
# Colleague User Interface 4.0- Basic New Features

## The Search Area – Opening a Person Card and Form

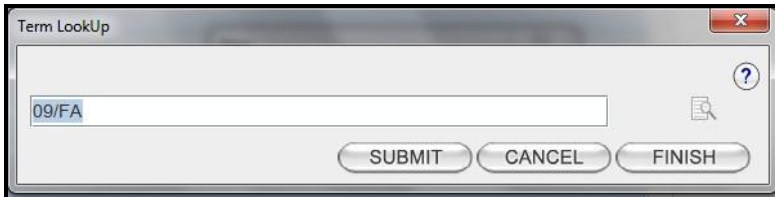
In order to open a **Form** such as STSC - Student Schedule, click the **radio button** (circle) to the left of the word **Form**. Then, type the mnemonic that represents the desired form in the **Search** box and click **Search** or Press <Enter>.

**NOTE: If the form doesn't open when the mnemonics are entered in the Search box, type the letters representing the Colleague application in which the form resides followed by a dash and the form mnemonics ( e.g. ST-STSC, ST-XRGK, or CF-XPUA ). Then, click the Search button or Press <Enter>. This is especially true of custom forms that start with the letter X.**

In addition, you can use the **Navigation tab** (as described on the previous page) to locate and open a form by double-clicking the form's icon.



A term lookup dialog box displays when opening the Student Schedule form.



- For the example above, type the **Term** for the schedule you wish to view by typing a **two digit year**, followed by a **forward (right facing) slash /**, followed by **two uppercase letters** representing the desired **term**. Then, click **Submit** or Press <Enter> to view form information for the person whose card is open.

<b>FA</b> Fall Semester	<b>IN</b> – Intersession	<b>S1</b> – Summer 1
<b>SP</b> - Spring Semester		<b>S2</b> – Summer 2

- If you have multiple person cards selected in your context area, you can view each person in this same screen by clicking the **Previous (<) or Next (>) arrow** in the context area at the top of the screen.

The Update prompt displays.



- Click **Update**, enter the desired **Term** when the Term LookUp prompt displays, and click **Submit** or Press <Enter>..

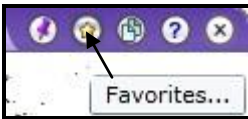
## Colleague User Interface 4.0- Basic New Features

Sometimes, the same groups of people are used to perform various procedures in Colleague. With Person Cards open, one or more cards can be saved as Favorites by clicking the Add to Favorites gold star button in the Context area.

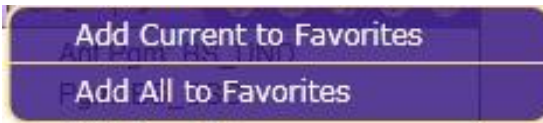
If desired, a new folder in which to organize and store groups of cards can be created and labeled.

### The Search Area – Using the Favorites button

1. With one or more Person Cards open, click the **Add to Favorites** button (gold star) in the Context area.

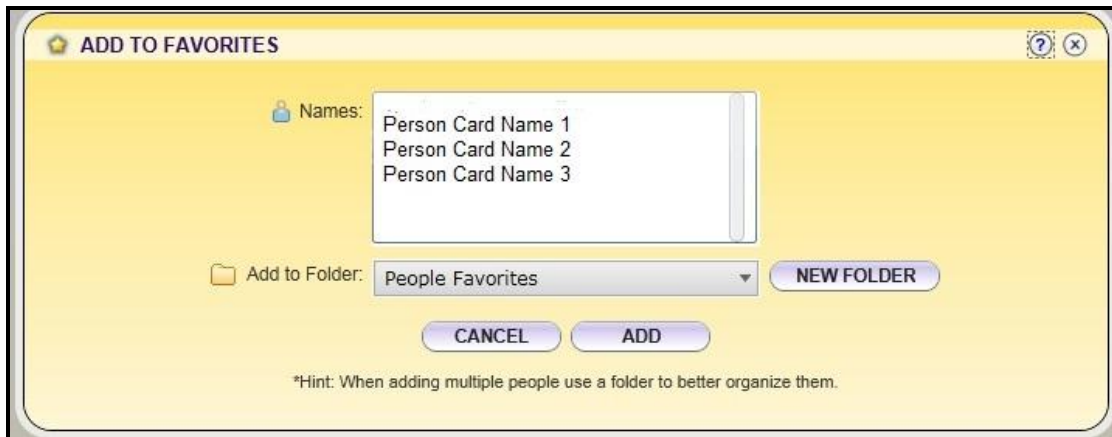


The Add Current to Favorites and Add All to Favorites options display.



2. Select **Add All** to Favorites (or Add Current if that is the only Person Card you want to save) to add all of the open People Cards to Favorites..

The following screen displays with names of all open People Cards.



## Colleague User Interface 4.0- Basic New Features

### The Search Area – Using the Favorites button (Continued)

3. Create a folder in which to save this particular group of People Cards, by clicking **New Folder**. Then, type a **Folder Name**, and click **Create**.

Note that the new folder will be placed in People Favorites unless another location is selected.

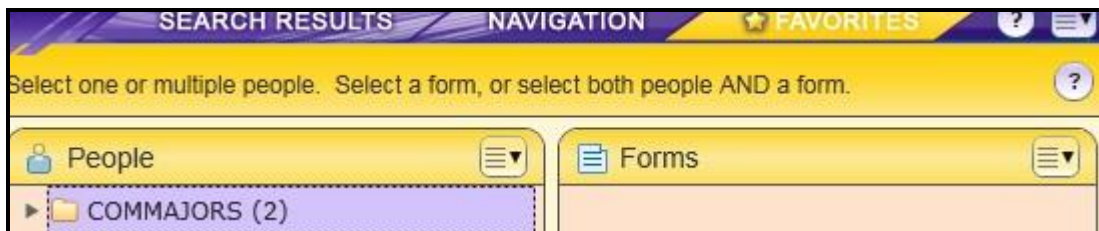


### The Search Area – Access and Use Saved People Cards

1. Log into Colleague, and click the **Favorites** tab.

All Stored People Cards and/or Folders and Forms display.

In the example below, only the COMMAJORS folder containing two People Cards has been designated as a "Favorite".



2. To open a People folder, double-click the folder name.

All People Cards stored in the selected folder should be available in the Context area.

3. Open the **STSC** (Student Schedule Inquiry) form or other form to which you have been granted access rights.

As long as the active form contains data fields that are appropriate for the active People Card, data for the person whose card is open should populate the form.

# Colleague User Interface 4.0- Basic New Features

## Saving, Cancelling, and Deleting Form Changes

Open forms display in the Colleague User Interface Form Area.

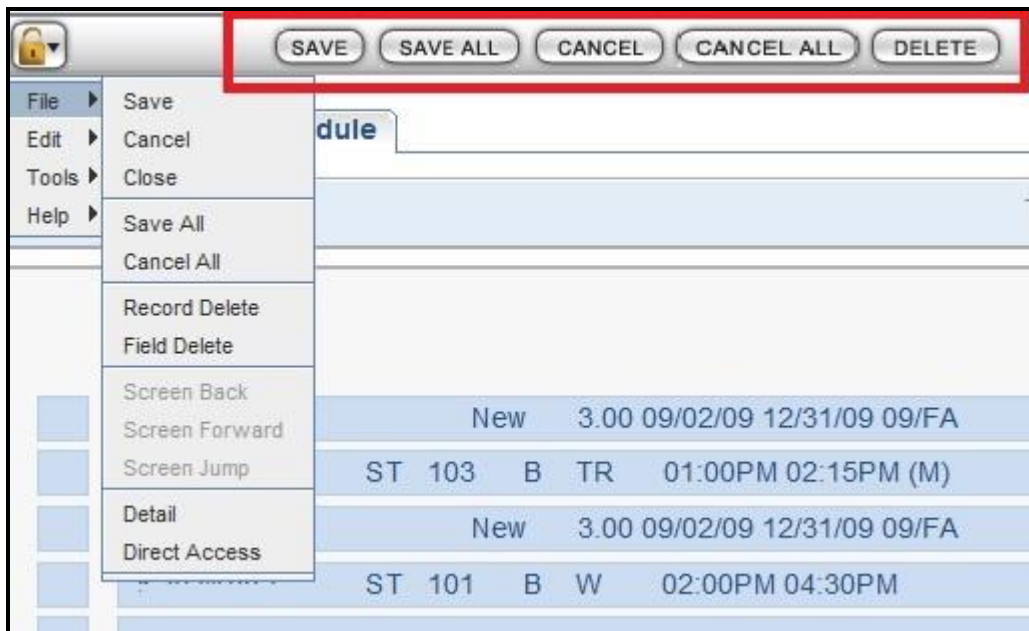
Save ALL, Cancel ALL, and selections from the File menu, allow applicable changes to be saved or cancelled.

On forms that allow it, Delete is used to delete an entire record.

**WARNING: DELETE should be used with great caution. Once you delete, your record is gone forever!.**


The Student Schedule screen only allows a schedule to be viewed. Other campus departments and personnel are given permissions to Colleague screens and forms that match their role on campus. Depending on a person's assigned permissions, those who are allowed to modify forms will be able to Save or Delete information in Colleague in order to keep our campus database up to date.

According to Datatel Inc, (Guide to User Interfaces, September 8 2009, p19), "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. If you have multiple records selected in the context area, you will be prompted to (UPDATE/CANCEL/RETURN) for the current record, then (DISCARD/NEXT/JUMP) FOR THE NEXT RECORD(S) in your context area.




# Colleague User Interface 4.0- Basic New Features


Forms in which editing can occur might contain several types of buttons.

**Detail Buttons**  appear to the right of some fields and provide the means to move to another form that contains more information on the particular field item and might allow editing.

**Note:** "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 (Guide to User Interfaces, September 8 2009, p 2`),

**Scroll Buttons**  allow fields containing multiple rows of data to be viewed.

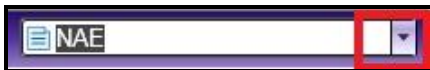
**Window Operation Buttons**  enable a row to be added or deleted.

**Date/Calendar Buttons**  appear to the right of fields where Dates need to be entered. Rather than typing a date, one can be selected from the calendar.

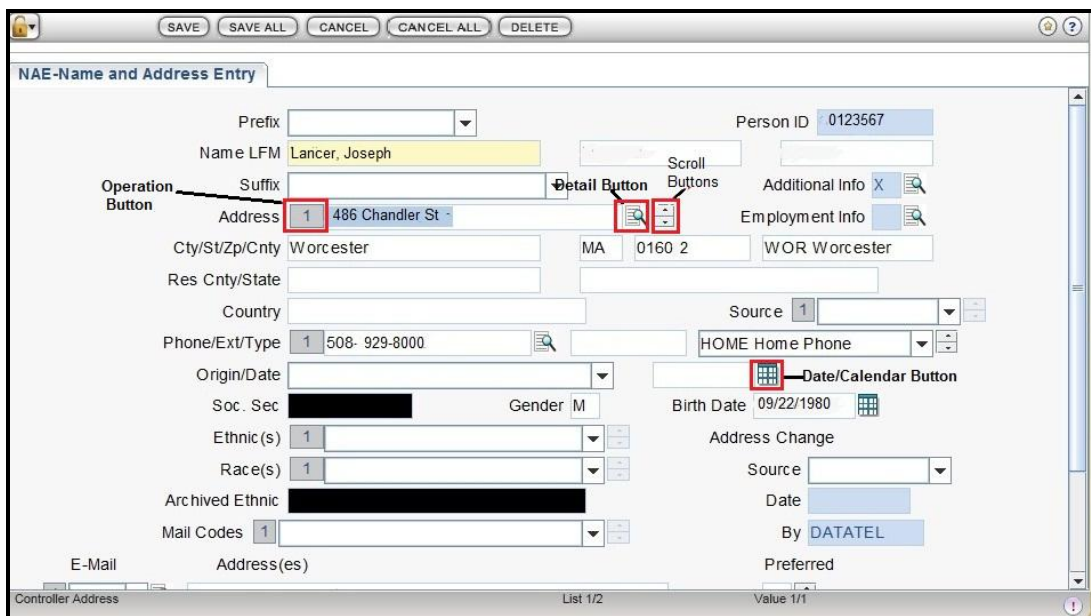
## Using the UI Form Area

1. With open People Cards displaying in the Context area, open a **Form** to which you have been assigned **Edit** permissions.

Type the form mnemonic in the Form Search area or select a previously opened form using the Form drop-down list.



The selected form opens and displays data for the active person card.



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## Using the UI Form Area (Continued)

2. **Modify desired data form fields.** Then, click the **Save** button at the top of the screen (or File/Save from the padlock drop-down menu). Sometimes, it is necessary to click a **Detail** button to the right of the field you wish to modify to access a different form that contains the data plus additional information. Once desired data has been edited, click **Save**.

The “Update record, Cancel record or Return to editing” Alert displays.



3. Click **Update** to save the changed data.

If more than one person card is active, the “A list of records is active. Discard entire list, go to the next record or jump to a record?” Alert displays.



4. Click the button matching your desired choice.

Discard is used to close the entire group of active person cards.

If Discard is selected, the Person LookUp alert displays.



5. Click **Finish** to close all forms and return to the Opening Colleague UI 4.0 window.

## Colleague User Interface 4.0- Basic New Features

### Logout of Colleague

6. If you are finished using Colleague, make certain to **Logout** using the **drop-down menu** on the far right-hand side of the window.



7. Close the browser window.