

Overview of Datatel Colleague® User Interface 4.3

*The Next Step in Colleague
Performance and Usability*
Joyce Valentine, Facilitator

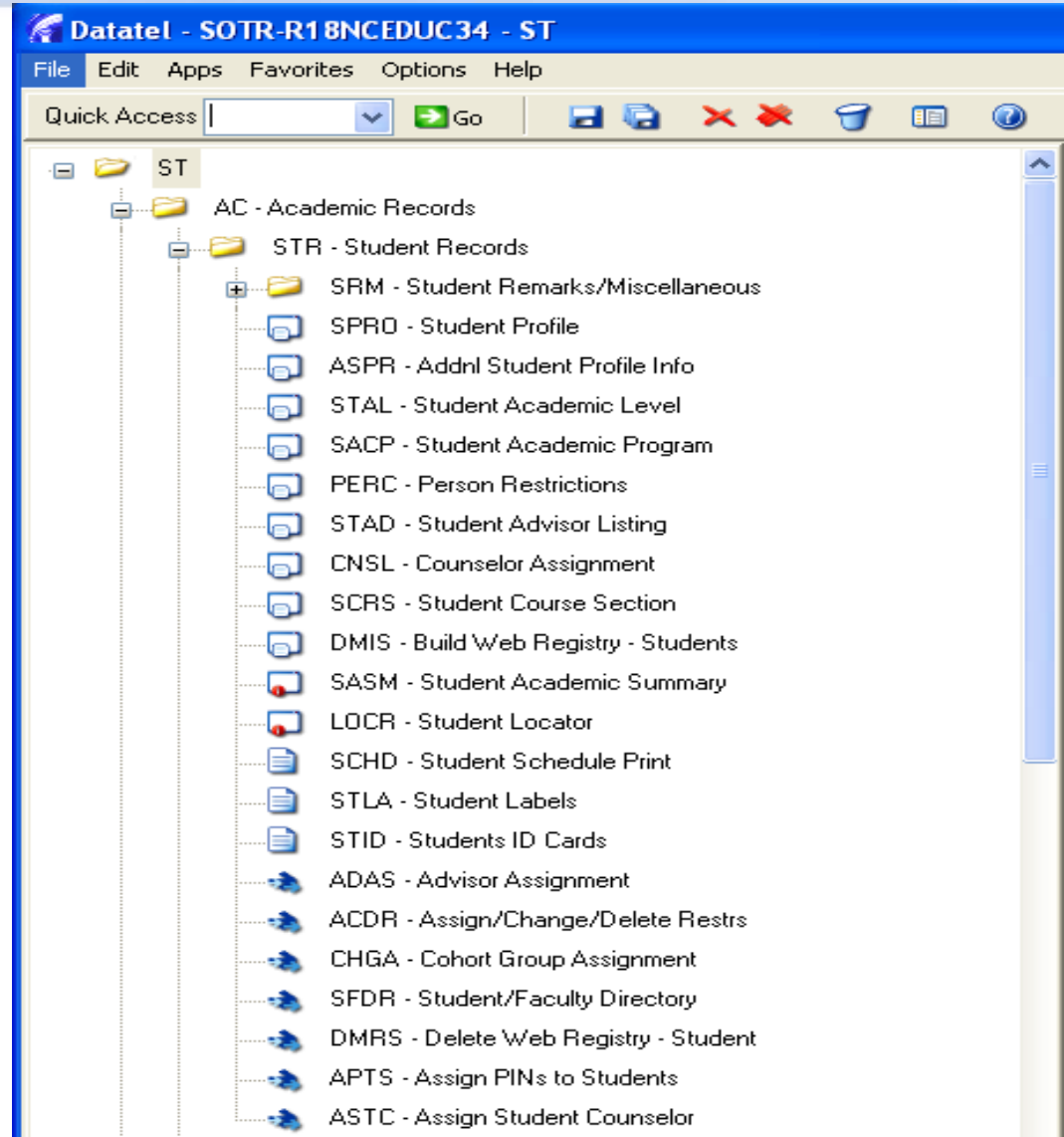
Training objectives ...

- Review functionality
- Review navigation
- Review modules and interfaces
- “Live” demonstration
- Review Datatel resources
- System Office support



Colleague 2.3 Quiz!

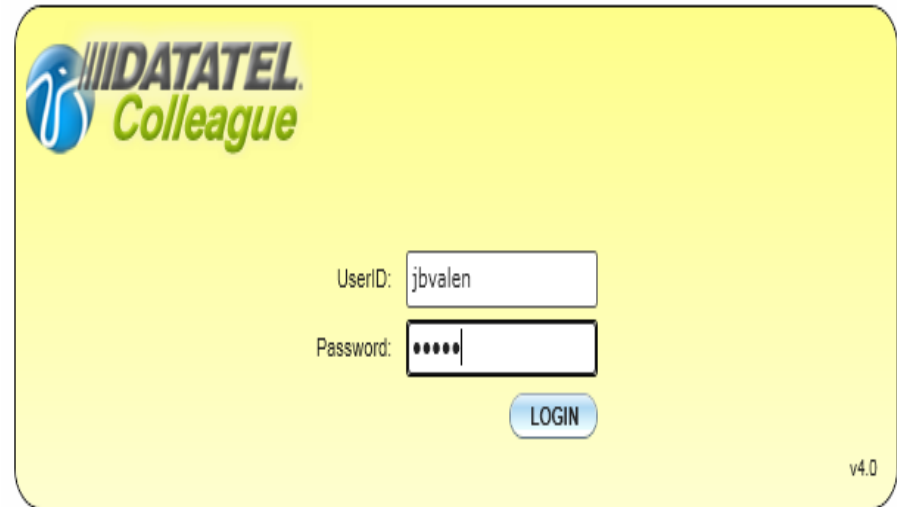
1. How do you *switch applications* in UI 2.3?
2. Which *icon* represents the *Inquiry* function in UI 2.3?
3. In this display, which **mnemonic** will provide a *Student Schedule Print*?
4. Which toolbar function in UI 2.3 allows you to *modify font s, colors and access Query Builder*?



System Requirements

For all users of Colleague version 4.1 and above:

- Web UI is an Internet browser rather than a desktop application
- **All Pop-up blockers must be disabled (i.e., MSN, Yahoo, gmail, etc)**
- Java 1.6.0_11 or higher installed
- Microsoft SilverLight



When is your campus migrating?



Colleague Web UI Terminology

- Context Header
- Person Card
- “Stacking”
- Photo Recognition
- Forms
- Tabs
- Grid view *versus*
Card view
- Favorites
- Advanced Search
- Shared Lists



Colleague UI 4.3 Enhancements ...

Person Card/Context Header

- ✓ 'Stack', open and close multiple cards
- ✓ Photo recognition available
- ✓ Open multiple forms for same person



A screenshot of a person card interface. On the left is a photo of a man in a suit. To the right of the photo is a header bar with the name 'Eric L. Lane' and ID '0075660'. Below the header is a table of personal and contact information.

1222 Mayton Circle Unit B Greensboro NC 27734	Phone: 252-758-5925 Phone: Email: lanee@nccommunityco...	Birth Date: 01/01/1990 Birth Name: ReunionClass:	Where Used: APP,MAI,PER,... Entry Date: 11/14/2008 Social: 239-23-9239
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Excel integration

- ✓ Colleague data exported into Excel

Improved and flexible Searches

- ✓ Use Photographs
- ✓ Export Search results using Excel

Navigation expanded



- ✓ No mnemonics needed

Window sizing

- ✓ Use Slider to re-size any form

Print Form feature

- ✓ Print UI forms easily without a third party program
- ✓ Save reports as a PDF

	Sonya Chanel Atkinson 0075547			
1997 Sunnybrook Rd	Phone: 252-823-5166	Birth Date: 08/30/1992	Where Used: FAC,MAI,PER,...	
Greenville NC 27834	Phone: 252-758-6881	Birth Name:	Entry Date: 08/19/08	
	Email: atkinsons@nccommun...	ReunionClass:	Social: 111-22-9320	

New Context Header

- ✓ Photo recognition (where available)
- ✓ Address and e-mail verification
- ✓ Select multiple people (“Stacking”)
- ✓ Add to **Person Favorites**
- ✓ Easy selection using ‘Pick List’

Search Features

- More advanced Form search
 - ✓ No mnemonics needed!
- More advanced Person search
 - ✓ Use Colleague ID or person name
 - ✓ No need to sort list
 - ✓ Grid view or card view



Section Search Results for: Section

#	Name	Mnemonic	Application
1	Section Bldg/Room Conflicts	XBRC	CORE
2	Additional Section Info	ASCI	ST
3	Change Section Spon Statuses	CSSS	ST
4	Completion Rates by Section	XHCF	ST
5	Course Section Schedule	CSSC	ST
6	Course Sections in Same Room	S2SR	ST
7	Duplicate Course Section Rpt	DCSR	ST
8	Enrollment Info by Section	XHCI	ST



Person Search Results for: smith (PERSON)

Filter: Combined | Select All | + Add | 1 - 5 of 5

1		Chris Smith ID: 0075134 Social: 236-01-0004	7822 Live Oak Blvd Wayne PA 19019 Source:	DOB: 07/10/1983 Birth Last: Where Used: MAI,FIN,APP,PER,STU
2		Dennis Smith ID: 0075560 Social: 224-86-9874	258 Glenwood Ave. Raleigh NC 27603 Source:	DOB: 11/24/1973 Birth Last: Where Used: FAC,FIN,STA,HRP,EM..
3		Norvie Smith ID: 0075563 Social: 123-45-9876	783 Jessie Lane Raleigh NC 27608 Source:	DOB: 08/10/1974 Birth Last: Where Used: FAC,FIN,STA,HRP,EM..
4		Suzzie M Smith ID: 0075587 Social: 222-33-0012	349 Peace St New Hope NC 20904 Source:	DOB: 07/22/1985 Birth Last: Where Used: MAI,FIN,APP,PER,STU
5		Scott Smithen ID: 0075135 Social: 236-01-0019	4542 Oak St Wayne PA 19019 Source:	DOB: 12/25/1978 Birth Last: Where Used: MAI,FIN,APP,STU

Advanced Search Feature

- Use when initial Search does not yield valid results.
- Use with Shared Lists
- Export Search results

Advanced Person Search

Name:

Shared List Name:

Source:

Class:

Address:

City:

State:

Zip:

Country:

SSN:

Status:

Alien ID:





Person Search Results for: ;ST SC (PERSON)

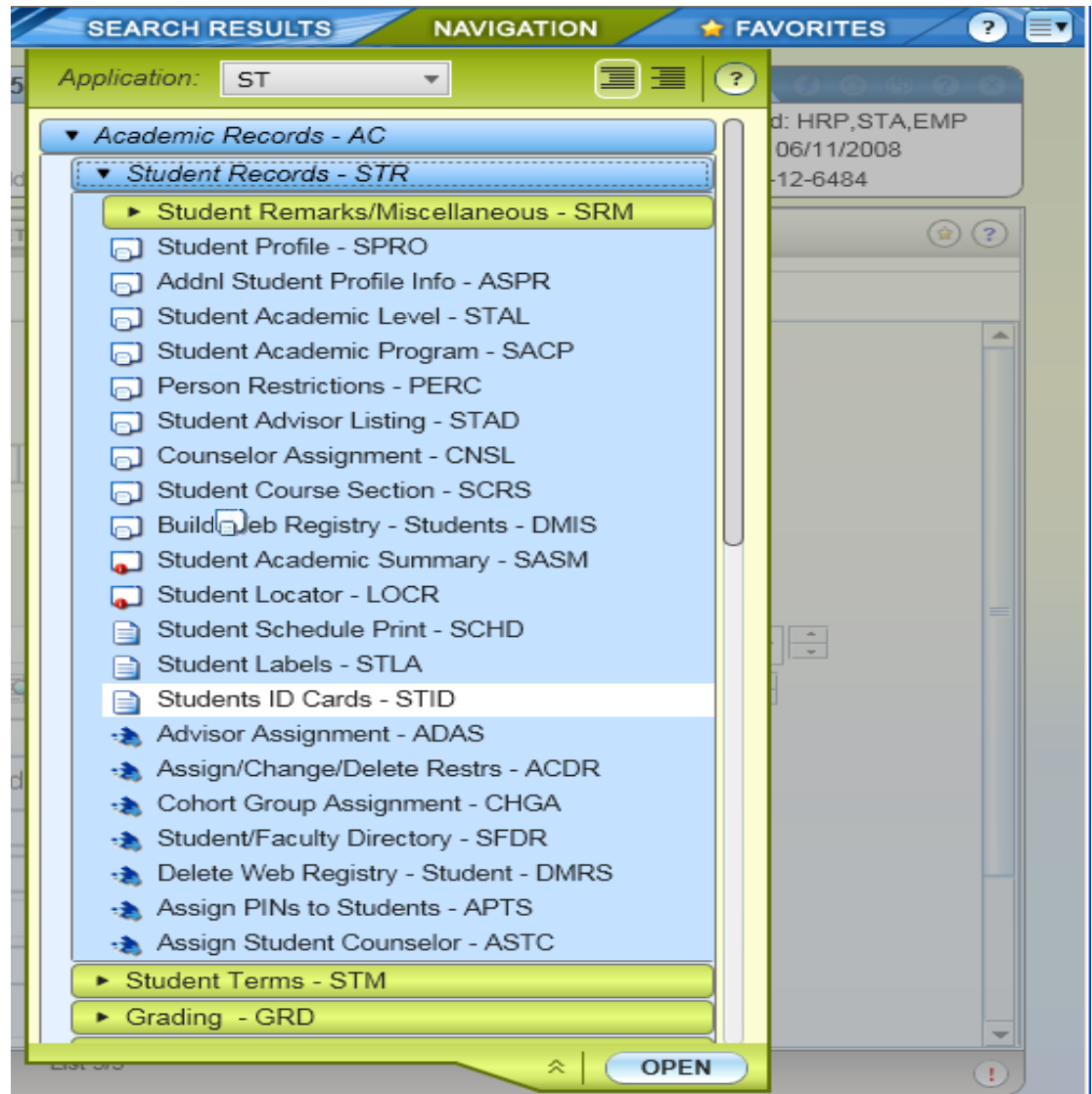
Filter: 1 - 5 of 5

#	Name	ID	Social	Address Line	Address CSZ	Source	DOB
1	Sandy Beach	0075404	118-22-4862	38 Slippery Hill Way	Monticello SC 29106		03/12/197
2	Betty C Boop	0075415	915-37-4862	91 Blank St	Monticello SC 29106		06/02/195
3	Gotta Gogh	0075444	019-05-0804	19 Wee Wee Place	Monetta SC 29105		07/12/197
4	Sal Goodman	0075628	111-11-1111	4523 Martin St	Greenville SC 29605		
5	Susan B Still	0075428	150-00-9466	36 Meadow Dr	Columbia SC 29201		10/31/195


1 - 5 of 5

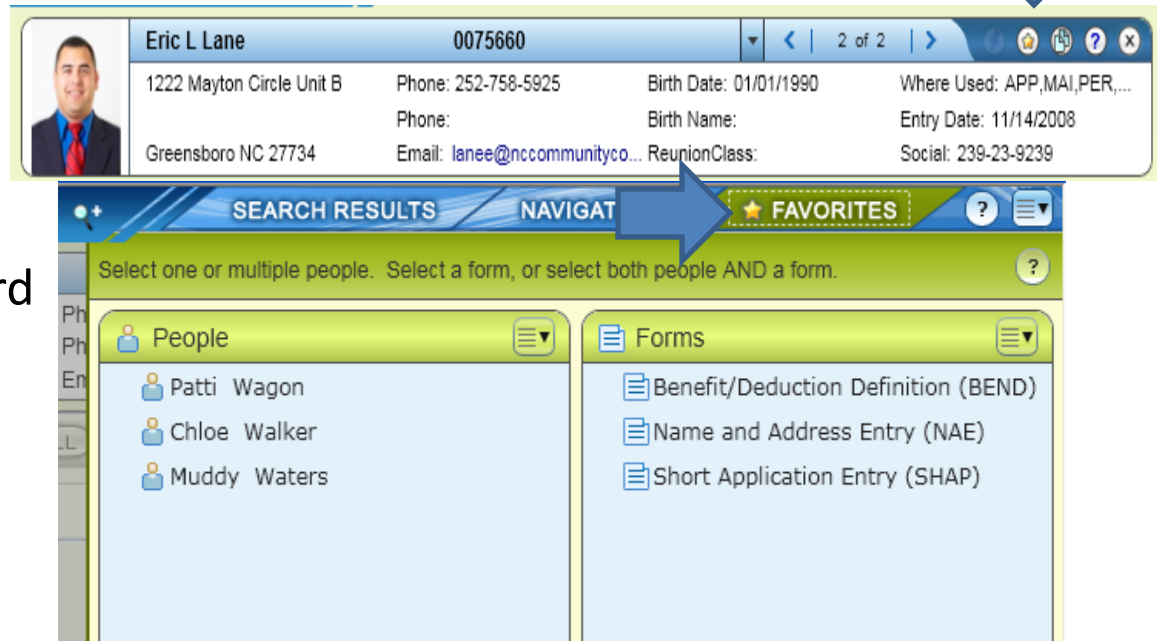
Navigation Tab and Icons

- ✓ Use **Application** drop-down arrow
- ✓ Click arrowheads to expand/collapse lists
- ✓ Four primary function icons remain the same
 - Maintenance 
 - Inquiry 
 - Report 
 - Batch Process 



Build a List of Favorites

- ✓ Click  (star) icon located on Person card or active Form
- ✓ Saves time
- ✓ More efficient data entry
- ✓ Defines workflows

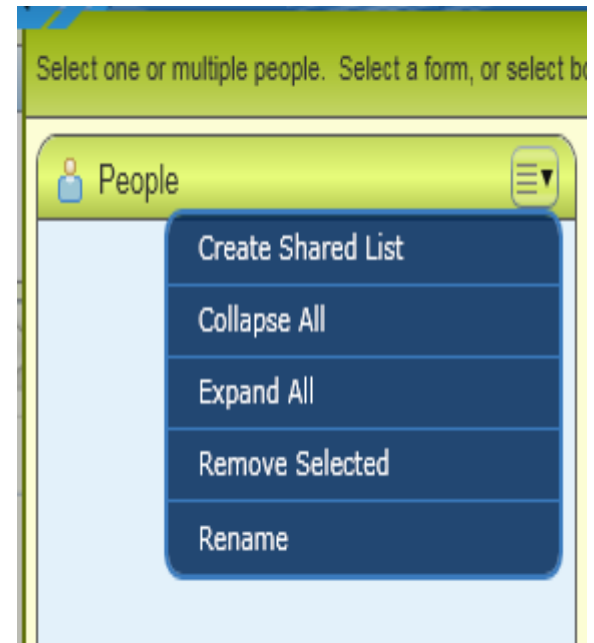


The screenshot displays a software interface with a person card at the top and search results below. The person card for Eric L Lane (ID: 0075660) includes contact and personal information. Below the card are tabs for 'SEARCH RESULTS', 'NAVIGAT', and 'FAVORITES'. The 'FAVORITES' tab is active, showing a list of people (Patti Wagon, Chloe Walker, Muddy Waters) and forms (Benefit/Deduction Definition (BEND), Name and Address Entry (NAE), Short Application Entry (SHAP)). A blue arrow points to the star icon on the person card, and another blue arrow points to the star icon on the 'FAVORITES' tab.

Person	Form
Patti Wagon	Benefit/Deduction Definition (BEND)
Chloe Walker	Name and Address Entry (NAE)
Muddy Waters	Short Application Entry (SHAP)

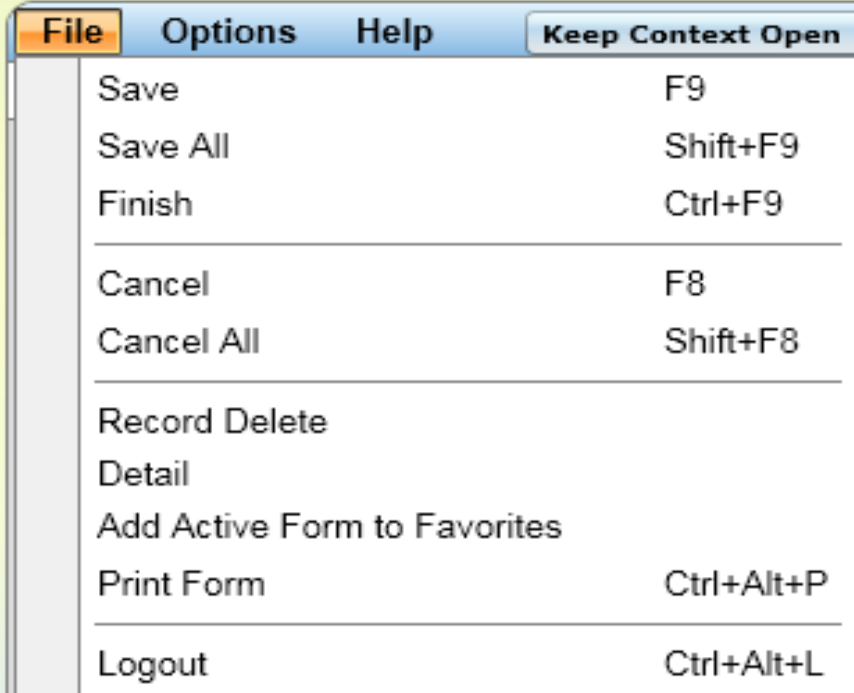
Shared Lists

- ✓ Easy to create and share
- ✓ Frequently used persons created and shared with co-worker
- ✓ Can be adjusted



File Options

- ✓ Functionality expanded
- ✓ Print Form
- ✓ Add form to Favorites
- ✓ “Safe” Logout

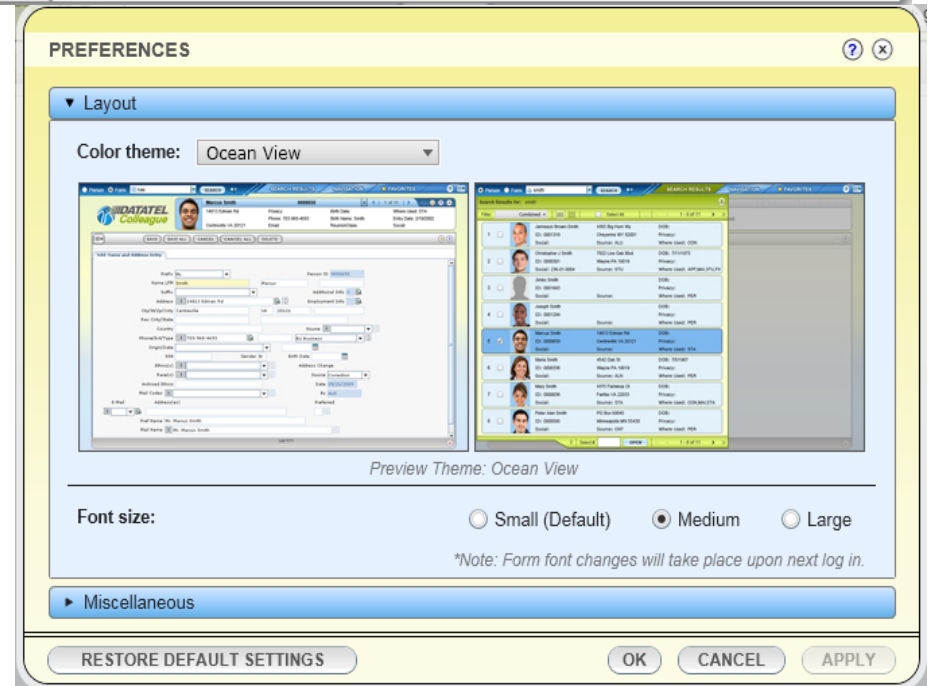
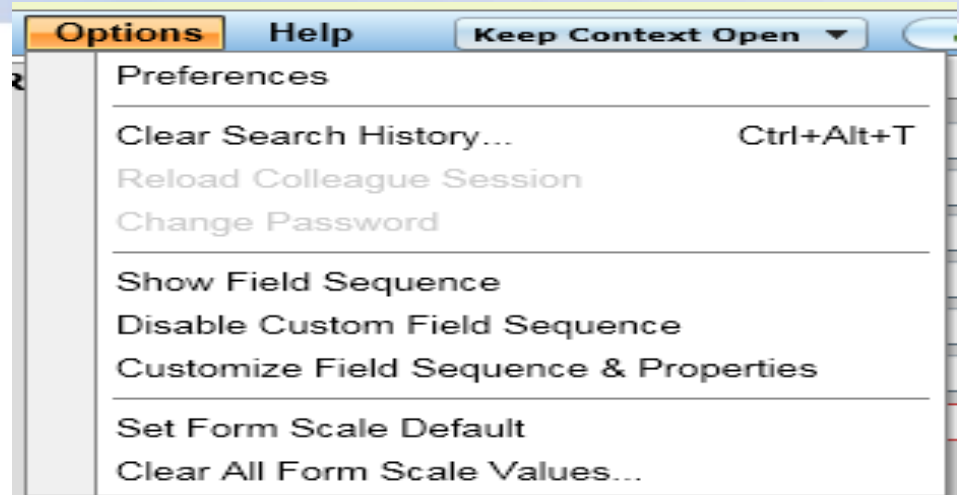


The image shows a screenshot of a software application's menu. The menu is titled 'File' and is located at the top of the window. The menu items are listed on the left, and their corresponding keyboard shortcuts are listed on the right. The menu is divided into sections by horizontal lines. The first section contains 'Save' (F9), 'Save All' (Shift+F9), and 'Finish' (Ctrl+F9). The second section contains 'Cancel' (F8) and 'Cancel All' (Shift+F8). The third section contains 'Record Delete' and 'Detail'. The fourth section contains 'Add Active Form to Favorites'. The fifth section contains 'Print Form' (Ctrl+Alt+P). The sixth section contains 'Logout' (Ctrl+Alt+L). There is a 'Keep Context Open' button in the top right corner of the menu.



File	Options	Help	Keep Context Open
Save			F9
Save All			Shift+F9
Finish			Ctrl+F9
Cancel			F8
Cancel All			Shift+F8
Record Delete			
Detail			
Add Active Form to Favorites			
Print Form			Ctrl+Alt+P
Logout			Ctrl+Alt+L

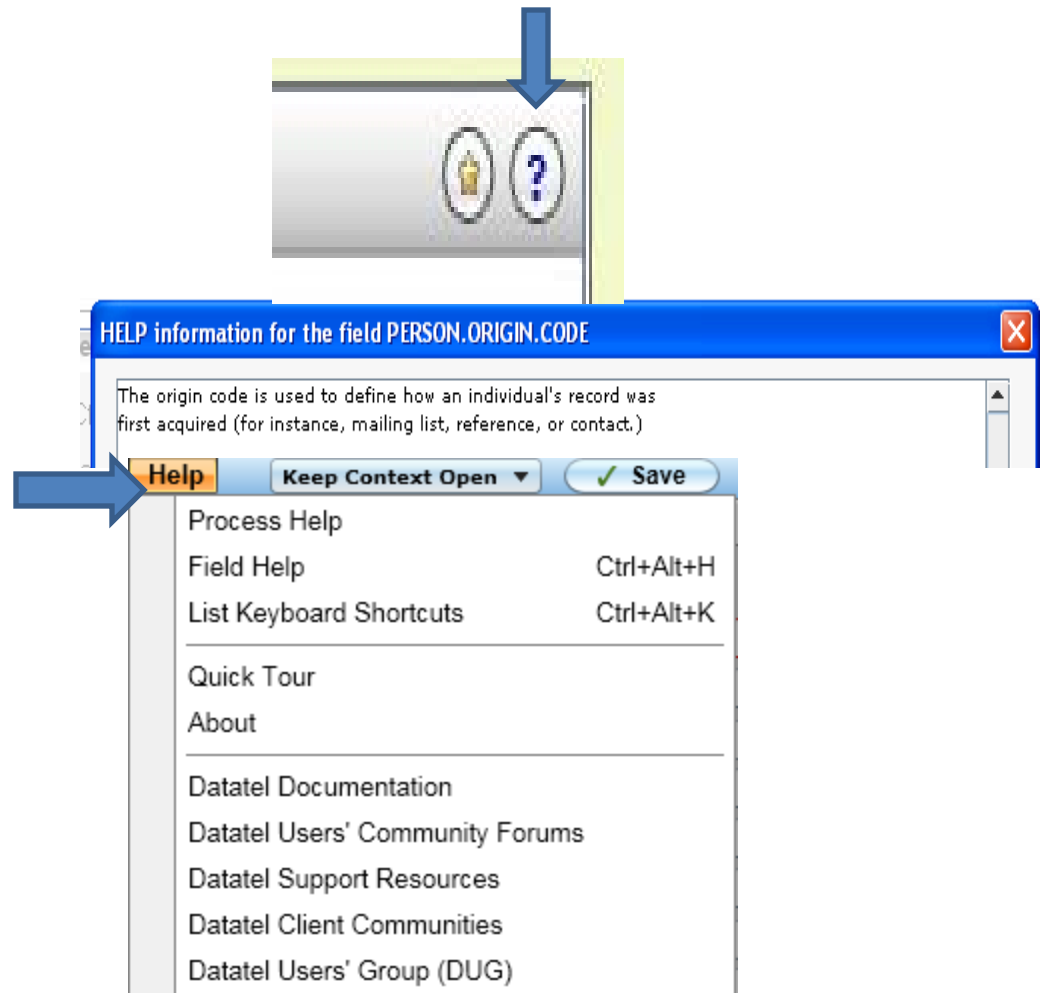
Form Options

- ✓ Use **Preferences** to adjust workstation theme, font size and background colors
- ✓ Adjust list display
- ✓ Clear Search history
- ✓ Set Form Scale Default
- ✓ Form Context Open/Close switch



Help Features

- ✓ Use help icon 
- ✓ Click  (help) icon for Context Header help
- ✓ Cursor in form field (or F1) activates Field help
- ✓ Select **Help** on 'active' form
 - Shortcuts available
 - Datatel resources



Knowledge Check!

1. Placing multiple Person cards in a 'list' is called
 - A. Indexing
 - B. Stacking
 - C. Shuffling
2. Preferences allows you to
 - A. Select background color, font size, theme and number of search results
 - B. Send emails to your favorite students
 - C. Puts forms in a Favorites list
3. To find Colleague forms with Financial Aid application, use
 - A. Person search
 - B. Form search
 - C. Google search
4. Datatel Colleague UI 4.3 is a
 - A. Desktop application
 - B. Web-based application



Questions or concerns?



5 Minute Break ...

Please return promptly!



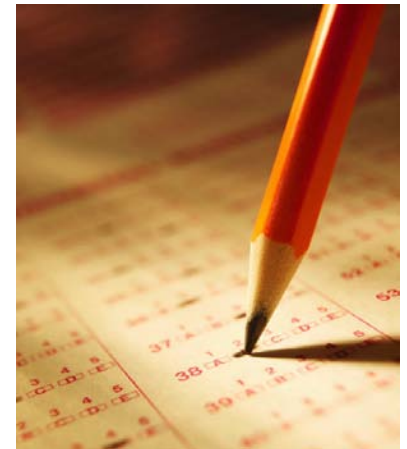
“Live” Demonstration



Knowledge Check!

True or False:

1. You can create multiple Favorite Folders in Colleague. T/F
2. Colleague forms can be stacked. T/F
3. You cannot create a Shared List of people records to share with co-workers. T/F
4. To print an active Colleague form, you need a third-party application. T/F
5. You can pull Colleague data into Excel directly from a form. T/F



Summary of Benefits

- ❖ Re-size forms
- ❖ Advanced Form and Person Search features
- ❖ Improved 'Context Header'
- ❖ Improved Favorites functionality
- ❖ Forms and processes work the same
- ❖ Export search results
- ❖ Print active forms
- ❖ Export report to PDF
- ❖ UI desktop and UI web can both be available during transition period



Resources

- ❑ *Datatel Guide to User Interfaces: Colleague User Interface 4.x, UI Desktop, UI Web* (176 pgs. Dated: February 5, 2010)
- ❑ *Datatel Release Highlights UI 4.x* (Dated: August 28, 2009)
- ❑ UI 4.3 Icons and Terminology
- ❑ Colleague UI form 'helps'
- ❑ Datatel online tutorials



From the System Office ...

Training (CIS/Datatel)

- Collaboration, consulting and analysis (via *Subject Matter Experts*)
- Blackboard Collaborate support (*formerly Elluminate*)
- NC Information Highway support
- CIS course evaluations
- College Usage Assessments (*upon college request*)

The screenshot shows the NC Community Colleges website with the 'Creating Success' logo and the tagline 'Hope • Opportunity • Jobs'. The navigation bar includes 'Resources', 'Students', 'Faculty & Staff', and 'Business & Industry'. A left sidebar contains links for 'Home', 'About NCCCS', 'Colleges', 'Success Stories', 'Excellence Event 2010', 'News & Events', 'Links', and 'Search'. The main content area is titled 'CIS Training/User Support' and features a 'College User Support Team' section with links for 'System Office Support Team Contact Information' and 'CIS Subject Matter Expert Contact Information & Colleges Served'. Below this is a 'Training Schedule & Registration' section with links for 'College Staff Training Schedule', 'System Office Staff Training Schedule', and 'Register for a Class'. The final section is 'Class Preparation' with links for 'Elluminate Overview (CIS classes)', 'WebEx Overview (Datatel classes)', and 'Travel & Facility Information (classroom session)'.

Questions or concerns?



Thank you for your
attention.
Have a great day!

