Colleague UI 4
Basic Navigation

CENTRAL TEXAS COLLEGE

FOR STUDENTS OF THE REAL WORLD

COLLEAGUE LEARNING GUIDE
Colleague Basic Navigation

COLLEAGUE BASIC NAVIGATION

Revised by
Scott Wyman

Central Texas College and its Operating Units, Divisions, and Sponsored Activities prohibit discrimination in employment practices because of race, color, religion, gender, national origin, age, disability, or veterans' status.
## Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Pages</th>
<th>Added/Updated</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-9-06</td>
<td>3</td>
<td>Added</td>
<td>Revision History and formatting changes i.e. repositioned pages, etc.</td>
</tr>
<tr>
<td>1-9-06</td>
<td>11</td>
<td>Added/Updated</td>
<td>Added Toolbar description to section 3 and removed from section 7</td>
</tr>
<tr>
<td>5-30-06</td>
<td>32</td>
<td>Added</td>
<td>Added procedure for employees to change their own Colleague password</td>
</tr>
<tr>
<td>11-9-09</td>
<td>7</td>
<td>Updated</td>
<td>Updated user password for training account</td>
</tr>
<tr>
<td>9-9-10</td>
<td></td>
<td>Rewrite</td>
<td>Revised entire document for use with Colleague UI 4.0</td>
</tr>
<tr>
<td>5/13/11</td>
<td>8</td>
<td>Updated</td>
<td>Updated link to the training website</td>
</tr>
<tr>
<td>2/28/12</td>
<td></td>
<td>Rewrite</td>
<td>Revised document for use with the new UI 4.3 Blackboard training</td>
</tr>
<tr>
<td>3/5/13</td>
<td></td>
<td>Rewrite</td>
<td>Updated document for use with current Blackboard Training.</td>
</tr>
</tbody>
</table>
Contents

Introduction ........................................................................................................................................................................ 6

Access Colleague .................................................................................................................................................................. 8

Colleague Familiarization .................................................................................................................................................... 8

Home Workspace Window Familiarization ........................................................................................................................... 11

User Interface (UI) Home Workspace Window ................................................................................................................... 12

Working with People ............................................................................................................................................................... 13

Opening Multiple Records .................................................................................................................................................... 18

Working with Forms (Part I) .................................................................................................................................................... 20

Navigation Tab ....................................................................................................................................................................... 21

Keyword Search (Part II) ......................................................................................................................................................... 23

Form Mnemonic ..................................................................................................................................................................... 24

Field Types and Buttons ......................................................................................................................................................... 26

Adding a Record ....................................................................................................................................................................... 28

Edit Field Entries ..................................................................................................................................................................... 29

Change an Entry ....................................................................................................................................................................... 29

Delete an Entry ......................................................................................................................................................................... 30

Special Field Codes ................................................................................................................................................................. 30

Field Navigation ....................................................................................................................................................................... 32

Detail Buttons ........................................................................................................................................................................... 32

Comment Fields ....................................................................................................................................................................... 33

Date/Time/Logon Stamp ............................................................................................................................................................ 34

Favorites .................................................................................................................................................................................. 36

Adding Forms ........................................................................................................................................................................... 36
The Family Educational Rights and Privacy Act of 1974 grants to students certain rights, privileges, and protections relative to individually identifiable student educational records which are maintained by the College. Central Texas College’s institutional policy is consistent with the intent, guarantees, and safeguards embodied in the legislation.
Introduction

Central Texas College District (CTCD) uses an integrated administrative software system. The company that originally created this software, Datatel, sold the rights to the program to Ellucian so you may hear both names being used.

The name of the software package we use is Colleague User Interface (UI). Colleague will be the database for most of what we do on a day-to-day basis, including, but not limited to, the following:

- Registration
- Posting of grades
- Scheduling of classes
- Personnel actions
- Payroll
- Purchasing
- Processing Financial Aid

The purpose of this training is to provide a limited overview of the Colleague UI System and to familiarize users with the system’s elements of basic navigation. Upon completing this training, individuals will be able to search and find people loaded in the database as well as navigate through various forms used for general departmental purposes.

The Colleague database has five components (Figure 1). Each component includes various modules and programmed applications.

- **UT (Utilities)** application modules are used by the Informational Technology (IT) Staff and System Administrators.

- **ST (Student System)** application modules relate to data concerning all students. It includes curriculum management, faculty information, academic records, accounts receivable, cash receipts, degree audit, financial aid, recruitment/admissions management, registration, campus organizations, and residence life.

- **HR (Human Resources System)** application modules relate to data regarding employees of the institution and include payroll, personnel, and position control.
CORE application modules include information, data elements, codes, and processes that are utilized by ALL (ST, CF, and HR) applications. It is a central location for information and rules used throughout Colleague. Data is Entered once and shared with authorized users. An example of shared information is a student who changes his/her address at the Records Office. The new address is immediately available to other areas of the college. If the student is also an employee, the change will be automatically available to Human Resources.

CF (Financial System) application modules relate to ALL financial data relating to both employees of the institution and students. CF includes accounts payable, budget management, fixed assets, general ledger, inventory, physical plant, pooled investments, and purchasing.

CTC has purchased the Student, Human Resource, and Finance Colleague application modules from Datatel. Each application contains on-line forms—also called screens. Users complete the forms by Entering data in the necessary fields.

Each application shares related information. The Core application houses the related information, and users may access that data (Figure 2).

ST  Student Application
HR  Human Resource Application
CF  Colleague Financial Application
CORE  Data shared by all modules

Note: This manual is designed to be used with the Colleague Database Training Simulation in Blackboard. If you do not have a User ID and Password for Blackboard go to http://www.ctcd.edu/hr/empl_trn/training_request.htm and submit a request for CBN training to the Employee Training Department.

You can also use this guide by itself as a reference and to study for the Final Quiz.
Access Colleague

You access Colleague by logging in with an assigned User Login ID and password. A security code associated with your password will allow you access to the screens required to complete your daily activities. This guide will provide general information to help you access, navigate, and enter information into the Colleague database.

After completing this training module, your supervisor will submit the required form for you to be set up for using Colleague. Please note, the Employee Training Department does not issue logon IDs and passwords for the R-18 Live system.

Colleague Familiarization

1. In Blackboard, click the Colleague Familiarization link in the course menu (Figure 3).

2. Click the CBN Familiarization link in Blackboard to begin the simulation (Figure 4).
3. Click the Colleague icon on the desktop.

4. At the logon window, Figure 6, click in the User ID: box and type, train01.  
   - The User ID: is case sensitive (type it exactly as shown).

5. Press the Enter key and type the Password, trains77.  
   - The Password is case sensitive (type it exactly as shown).

6. At this point you can either Click the LOGON button or press the Enter key. For this training we will press the Enter key.

7. You may briefly see the DATATEL Colleague Logging In screen shown in Figure 7.
8. You will then see the Disclosure of Information Statement seen in Figure 8.

9. Please read this statement, it does apply to you during this training session just as it will when you log in to the R-18 Live system.

10. Click the **OK** button to proceed and Colleague will present you with a Quick Tour video. In the simulation the video is not available. You can watch the video if you like when you get access to the R-18 Live system.

   Click the **Close** button to close the video window.

11. You will now see the Colleague Home Workspace Window shown in Figure 10.
Home Workspace Window Familiarization

Figure 11
User Interface (UI) Home Workspace Window

Let’s take a few minutes and discuss each item on the familiarization diagram on the previous page. Most items are pretty simple to understand and quick to explain.

We will start in the top left corner of the window; follow along an click on the page items as directed in the simulation.

Please note: Not all items listed are mentioned in the simulation.

Follow the on-screen instructions.

1. **Person and Form Selector Button** – (click) used to select your search subject
2. **Search Field** – Enter a name, word, number, or mnemonic to search for
3. **Search Button** – click this button to initiate the search
4. **Advanced Search Button** – (click) offers more fields to Enter more specific search criteria
5. **Search Results Tab** – (click) drops down to display search results in context cards or in a grid
6. **Navigation Tab** – (click) use to navigate forms when the mnemonic is not known
7. **Favorites Tab** – (click) Enter favorite people and forms for quick access
8. **File** – (click) access to file options such as Save, Save All, Close, Close All, Record Delete, Add Active Form to Favorites, etc.
9. **Options** – (click) access to Preferences, Clear Search History, Change Password, etc.
10. **Help** – (click) access to Keyboard Short Cuts, Quick Tour video, and other Datatel documentation
11. **Context Area** – area where context cards open to display a person’s general information such as Name, ID#, address, email, SSAN, etc.)
12. **Form Window** – area where forms are displayed
13. **Help Button** – opens online help for Colleague
14. **Logout Button** – use this to properly logout of the Colleague database
15. **Add to Favorites Buttons** – use these buttons to add forms and people to your Favorites panel
16. **Keep Context Open** – specify what you want Colleague to do with open context cards when you save or cancel from a form
17. **Form Toolbar** – buttons used to save and close forms
18. **Form Zoom Slider** – used to adjust the magnification of open forms, does not magnify the context area

19. **Print Form Button** – click this button to print the active form

**Note:** *Because of your individual security classification, the forms and areas available to you in the R-18 Live system will be different from the ones you will see here.*

There are two main tasks you will perform in Colleague. You will either go in to work with, or review, a person’s database record, or you will be going in to edit, or initiate, a form that applies to your job. We will start with the basics of working with people to see if they are in the Colleague database and view their information.

**Working with People**

1. In Blackboard, click the Colleague Familiarization link in the course menu (Figure 12).

2. Click the CBN Familiarization.swf link to begin the simulation (Figure 13).

3. The first thing you need to do is make sure the Person and Form selector button is set to **Person Search** (Figure 14).

   Ours is set to Form so click the button. Now click in the **Search Field** and you will see the flashing insertion line.

4. There are different ways to conduct your person search. You can search by Colleague ID, sometimes referred to as Employee ID or PEID; you can search by Social Security Number, or you can search by name. Searching by Colleague ID is the fastest way to search.
5. If you know the Colleague ID (Employee ID) of the person you are looking for type it in the Search Field. For this exercise, Enter the Colleague ID number 131972 (Figure 15) and then press the Enter key.

6. Since the Colleague ID is generated by this database there is no chance of having duplicates so if the person you are searching for has a record in the database the Search Results Tab will briefly open and then close. The person’s information will now be displayed on a Context Card displayed in the Context Area (Figure 16).

7. Once the individual’s information is loaded in the Context Area you can start working with forms if that’s what is needed, but we’re just looking to see if people are loaded in the database for right now. Let’s look at the two other ways to search for a person in Colleague.

8. Please note that records can be viewed in the Context Area by more than one person at a time, but can only be used in forms by one user at a time. If you try to open a form using a populated Context Card and receive an Alert box (Figure 17) saying the person is locked, you will have to wait until whoever has it open is finished and has closed the form.

9. Next we will search by Social Security Number (SSAN). Double-click in the Search Field and Enter the following SSAN, without the dashes, 000-00-0000 and then press the Enter key. Colleague will search the database and open the Search Results Tab (Figure 18) to display all the matches for the number you Entered. In this case there was only one that matched, and there should be only one.
10. There are three ways to add records to the Context Area. We will see all three ways as we go through this course. For this exercise, double-click anywhere in the shaded area of the Context Card (Figure 19).

11. Now if you look at the navigation bar in the Context Area (Figure 20), you can see we have two Context Cards loaded in the Context Area. Later in the course we will scroll between cards using the Next and Previous buttons (circled below).

12. The third way to search for a person is by using their name. You can search by name using different formats. For example if all you have is a last name, type it in the Search Field and click the Search button or press the Enter key on the keyboard. Colleague will search the database and display all matching names in the Search Results Tab.
13. For this part of the lesson, you need to double-click in the **Search Field**, type the name **Ghost**, and then press the **Enter** key. Please keep in mind that it's not a good idea to search by last name only. If you are looking for someone with a common name like Smith or Johnson you could lock up the database due to the large amount of data you are asking for.

14. You should see the screen shown in Figure 21. As you can see our search returned 7 records that match the name Ghost. The records are displayed in the Search Results Tab as Context Cards.

15. In the bottom right portion of the window (arrow in Figure 21) you can see Colleague is displaying records 1 through 7 of 7 records. If you have more than one page of cards you can navigate through the pages using the scroll buttons.

16. In the next exercise we will use the last name and first initial of a person to see how we can reduce the number of records retrieved, saving us some time.

17. **Double-click** in the **Search Field**, type **Ghost, A**, and then press the **Enter** key. Now our number of Context Cards will be reduced from 7 records to 4.

Not separating the last name and first initial with a comma will result in no records being returned because Colleague will look at the request as **Ghosta**, and there are no records under that name.
18. Knowing the person’s first and last name will reduce the list of possibilities even more.

19. **Double-click** in the **Search Field** again, enter **Ghost, Almost**, and then press the **Enter** key (in the Live system you could Enter first name last name and get the same results). Our list of possible records has now been reduced to two (Figure 22).

20. We will use a second way to select records from the **Search Results Tab** to add to the **Context Area**.

21. At the bottom of the **Search Results Tab** you will see the **Input box**: We want to load Almost A. Ghost’s record so enter the number that corresponds to that record, 1, in the **Input** box and then press the **Enter** key (Figure 23). Now we have three records loaded in the **Context Area**.

22. As you can see, when searching by name, the more specific the information you enter in a search, the more precise the information returned will be. On to the next part of this lesson.
Opening Multiple Records

23. **Double-click** in the **Person Search Field**, type **Ghost**, and press **Enter**.

24. Now that you have the list of Context Cards displayed it’s time to use the third way to add records to the Context Area. For this exercise we will use the check boxes to select the record, or records, we want to work with. From the list of Context Cards you can select one or more records to work with. Select records by clicking the check box on the left side of the Context Card and then click the OPEN button on the bottom.

25. We will start with **Almost Richard Ghost** so click the check box beside #2. Now click the check box beside **Andrew Ghost, #3**. And finally, click the check box beside **Transparent Ghost, #5**. Now click the **OPEN** button at the bottom of the Search Results Tab.

26. Clicking on the OPEN button will cause the Search Results Tab to close and the records you selected will now populate the Context Card in the Home Workspace Window.
27. In the Context Area there is a navigation bar to use when you have more than one person loaded. It will display which record you are looking at and how many you have open.

28. **Click** the **Right Navigation** button to view record #5.

29. Now **click** the **Left Navigation** button to go back to record #4.

30. **Click** the **Left Navigation** button to go to record #3.

31. When finished, you can clear the Context Card area by clicking the close button in the top right corner of the Context Area. If you have more than one person card populated you will get the option to Close All, or Close Current.

32. **Click** on the **Close** button and then click the **Close All** option and we will move on to the next lesson, Working With Forms.

---

This space intentionally left blank.
Working with Forms (Part I)

The forms in Colleague are where the majority of your work is done. Each of you will have your own set of forms you will use based on where you work and your individual security settings. Some of you may be able to open, change, and save records while others can only open and view records. As noted earlier, you will not have the same access in Live as you do in Training, so you may not be able to access the forms used here when you get your own access.

1. Start this lesson by clicking on the Working With Forms link in the course menu (Figure 26).

2. Now click the Working With Forms Part I link in the main Blackboard window (Figure 27).

3. Before we open any forms you need to know the different types of forms available:

   - **Maintenance**------- Users maintain (add, edit, delete) data
   - **Inquiry**-------Users view, but cannot change data
   - **Report**-------Generated report with certain options
   - **Processing**------ Starts a program that manipulates a record in the background
Navigation Tab

1. Now let’s look at some forms. For this part of the lesson we will assume we need to update someone’s address. To do this we need to search for and open a specific form. One way to perform a form search is to use the Navigation Tab.

2. **Click** on the **Navigation Tab**, it will drop down the **Navigation panel**. At the top of the panel you will see a drop-down arrow button. **Click** that drop-down arrow you will get a list of **Application** areas in the Colleague database (Figure 28).

   UT = Utilities
   CORE = Core data
   ST = Student data
   CF = Colleague Financial data
   HR = Human Resources data

3. The application areas you will have access to in the R18_Live system depends on your security settings. If you work in Registration you probably won’t have access to the HR Application. If you work in Facility Management you probably won’t have access to the Student Application.

4. For this exercise we will work from the Student Application so **click** on **ST** in the list (Figure 29) to display available form areas.

5. Here you will see we have three areas available to us (Figure 30): Academic Records, Person Demographics, and Registration.

6. Notice the little black triangles to the left of each area. These indicate there are more options under that area. **Click** on the **Academic Records – AC** option.
7. Now **click** the **Student Records – STR** option and you will see we have one form available to us. Here you will see the Maintenance form icon and the form mnemonic, SPRO, (Figure 31).

8. **Click** the **Person Demographics – DM** option. Here you can see three more Maintenance forms and two Processing forms (Figure 32).

9. **Click** the **Registration – RG** option and you will see the Registration Person Entry – RGPE, a Maintenance form, and the Registration Statement Print – RGST, a Report form (Figure 33).

10. Now we want to open a form. There are two ways to open a form from the Navigation panel. You can either click on the form option to select it and then click the OPEN button at the bottom of the panel (Figure 34) or you can double click the form name from the list. We will **double-click** the **Name and Address Entry – NAE** option.

11. This will open the Name and Address Entry form. With no records loaded in the Context Area, Colleague will prompt you **Enter** information in a **Person Lookup** box as shown in Figure 35.

12. At this point you would enter a person’s name, Colleague ID, or SSN. If the person is in the database, Colleague will populate the Context Card and the form.
13. We'll do that later; for now click on the **CANCEL** button to close the Person Lookup box and the NAE form. Next we will look at searching for forms using key words.

**Keyword Search (Part II)**

1. The first thing you need to do is make sure the **Person and Form Search** button is set to **Form Search** (Figure 36). In this system you don't have to know the specific form to get where you want to go, it helps, but it's not necessary. For example, we want to find a form used to submit a requisition, but we're not sure what the form name is. To do our first keyword search we'll enter only the first two letters.

2. In this system, we can type a key word in the Search Field and Colleague will go find all forms that have that word, or word part, in the name.

3. Type **Re** in the **Search Field** and press the **Enter** key. This search returned five forms that are available to us (Figure 37). Now double-click in the **Search Field** and type **add** and press the **Enter** key.

4. From this list (Figure 38) we can see, based on the icons, that there is one Maintenance form and two Processing forms available. This list also tells me what the mnemonic (pronounced: ni-mon-ic) for each form is and in which Application the form is stored.

5. Just like when we worked with names, there are multiple ways to open a form from the Search Results Tab. **Click** on the **Person Address** option and then click the **Open** button at the bottom of the panel.
6. Colleague will open the form (Figure 39) and display a Person Lookup box.

![Figure 39](image)

7. We’ll work more with the forms in a bit, but for now click the **Cancel** button and we’ll press on.

**Form Mnemonic**

1. The final way to search for forms is by entering the form Mnemonic directly in the Search Field.

2. A mnemonic is a shortcut identifier code assigned to each form in the Colleague database. Some mnemonic examples are NAE, SPRO, RINQ, and EMER. These mnemonics are for the Name and Address Entry form, Student Profile form, Requisition Inquiry form, and the Emergency Information form. Don’t try to memorize the mnemonics from this lesson. You’ll soon have the ones you use in your daily duties memorized.

3. Say for example, we need to update a student’s directory information option. That change can be made in the Student Profile form. The mnemonic for the Student Profile form is SPRO.

4. **Click** in the **Search Field**, type **SPRO**, and then press the **Enter** key. Colleague will open the Student Profile form and display a Person Lookup Box. Enter the Colleague ID # **131972** in the Person Lookup box and press the **Enter** key.
5. The screen shown in Figure 40 is the Student Profile form populated with Barbie Test’s data. With this form open, let’s look at some of the different form components.

![Student Profile Form](image)

*Figure 40*

This space intentionally left blank.
Field Types and Buttons

1. Once you get a form open and populated with record data you are likely to see a variety of different field types and buttons. There are seven different types of fields and three field buttons in Colleague. However, not all forms will have each of the field types and buttons, but you need to be familiar with all of them and what they do.

2. Field Types (refer to corresponding numbers in Figure 41)
   - **Locked Field** (1) – Shaded fields you cannot edit
   - **Multi-Value Field** (2) – Preceded by a number, (3) – when selected, displays field toolbar
3. For this part of the exercise you need to open the **Name and Address Entry** form. **Double-click** in the **Search Field** and **type** the mnemonic, **NAE**, and press the **Enter** key. Continue with field identification using Figure 42.

- **Mandatory Field** (1) – Fields with red border must be populated before saving
- **Free Entry Field** (2) – No additional buttons
- **List Box** (3) – Provides a drop-down menu

4. **Buttons**

- **Detail Field** (4) – Opens sub-forms associated with the field
- **Calendar Field** (5) – Opens point-and-click calendar
- **Calculated Field** – Opens an in-form calculator
Like I said, not all forms will have all of the different fields, but you will probably see them all as you work with the various forms involved with your job.

Adding a Record

1. The first thing you must do prior to entering a new employee into the Colleague database is conduct a thorough search to ensure they are not already in there. Use all possible ways of searching covered earlier in this class (Name, SSN, Colleague or Employee ID). If you see someone who could be your new person, check it and double check it using the date of birth (DOB) for verification before entering the new person.

2. We are not actually going to make changes to this form so close it by clicking on the Cancel All button and then click the close button on the Context Card.

3. Depending on where you work, you may have the need to enter new people in the system, especially if you work with student registration or employment services.

4. Not everyone will have the security permissions to add people into the database, but we should all know how the process works.

5. We’re going to start by opening a form to work with. Double-click in the Search Field and type the mnemonic RGPE and press the Enter key.

6. When adding records to the database this way you should enter names in the First Middle Last format such as: Frederick Joseph Flintstone, or Fred J. Flintstone.

7. When Enter ing names with spaces, such as Billy Bob Von Ghost, there a few key things you need to know. Let’s start by entering the new name and see what happens.

8. Click in the Person LookUp box and type billy bob von ghost and press the Enter key. You don’t need to worry about capitalization; Colleague will do that for you.

9. Colleague will pop up an alert telling you the record could not be found and asks you if you want to Reenter or Add. This is a good indication that this person isn’t already in the system. We want to add this person so click the Add button.

10. Notice how Colleague broke the name down (Figure 43). Not quite what it should be, so now would be a good time to explain the keys to entering a record with two-part names.
11. To get Colleague to recognize the names that go together you must use an underscore to connect those names.

12. **Click** the **Cancel** button to close the form, **click Cancel** in the alert box, and let’s try entering this record again. This time **click** in the **Person LookUp box** and type **Billy Bob Von_Ghost**.

13. **Click** the **Add** button in the alert box and see the difference (Figure 44).

*Figure 44*

### Edit Field Entries

**Change an Entry**

1. For names with multiple capital letters, such as BillyBob, or LaRon, or DeVere, you can change the name after it has been entered.

2. To change the record name so that both Billy and Bob are capitalize you use what is known as a “Literal Entry”

3. Literal entries tell Colleague you want the name to be displayed exactly as you type it. The key to a literal entry is they begin with an equal sign (=). Colleague will display exactly what you type after the equal sign.

4. To fix the first error in our new record, **double-click** in the **first name field**. This will highlight the existing name and now all you do is type **=BillyBob** and press the **Enter** key. Your entry should now look like Figure 45.

*Figure 45*
Delete an Entry

1. Now to delete the highlighted middle name that doesn’t belong you use the keyboard shortcut Ctrl+Alt+D.

2. Because of the way this database automatically populates forms in the background based on field entries of other forms, you should not use the <Delete> key to remove the contents of a field. This may remove it from the current form, but it will not delete the information that was populated in background forms based on this entry. Using the Ctrl+Alt+D shortcut will remove all linked occurrences of this entry.

Special Field Codes

1. Some fields in Colleague only accept specific entries. The problem is they don’t tell you which fields require special codes.

2. On the RGPE form, look towards the bottom at the Res Status/Date field. As you can see this is a Multi-Value field and logic may tell you that this field is where you put the person’s residency status. Well, BillyBob is a Texas resident so click in the Res Status/Date field and type, Texas Resident and press the Enter key.

3. Colleague responds by telling you, via an alert box (Figure 46), that this is an invalid entry. Apparently you can’t have any spaces in this field so click the OK button and we will enter the information using an underscore so it appears as one word. Type Texas_Resident and press the Enter key.

4. Well, apparently Colleague doesn’t like that either. So just how are we supposed to know what to enter in the different fields? Click the OK button and I’ll answer this frustrating question.

5. Some fields in Colleague require very specific entries, this is one example. For fields that don’t accept the data you are trying to Enter you may have to conduct a search to find what entries are allowed. Many, but not all, form fields will allow you to enter a special search code. The code you enter to search for field entries is known as an ellipsis. An ellipsis is a series of three periods (...).
6. Enter \ldots in the Res Status/Date field and press the Enter key. SPECIAL NOTE: Be very selective when using the ellipsis to search for field entries. If you enter an ellipsis in a field such as a NAME or ADDRESS field you could lock up the database because Colleague will try to retrieve ALL entries for that field. Use the ellipsis as a last resort ONLY!!!!

7. Fortunately for this special field there are only five possible entries (Figure 47). As you already know there are several ways of selecting list items from the Search Results Tab. For this exercise double-click on the Texas Resident option. Colleague will enter the required code followed by the current date.

8. This is one of those areas where you will learn what the field codes are and before you know it you will be entering TXR in this field instead of an ellipsis.

9. Had this been a real registration you would continue adding data to BillyBob’s record. At a minimum you would have to enter the mandatory fields (those outlined in red) before you could save this record and continue.

10. We are done with this exercise and don’t need to save any changes so click the Cancel All button on the form toolbar (Figure 48).

11. If the field is a List Box, click the drop-down arrow and select from the list of choices.

12. If the field is a Date field, click the Calendar Button to choose a date.
Field Navigation

1. You can move from one field to another in a Colleague form a few different ways. Let's open a form and have a look.

2. **Double-click** in the **Search Field**, type the mnemonic **NAE**, and then enter the Colleague ID number, **1107521**.

3. The first way to navigate around the form is to point and click with the mouse in the field where you want to go. **Click** in the **Suffix** field. Next, **click** in the **Address** field. And finally, **click** in the **Phone** field.

4. If you would like to move from one field to the next, in order, you can follow the preset tab order of the fields. Press the **Tab** key and watch what happens. The focus moves to the next field in the tab order. Next use the **Shift+Tab** key combination and you will see the focus will move back to the previous field.

5. The third way is to use the **Enter** key. The enter key behaves just like the **Tab** key. The only exception is you cannot use the **Shift+Enter** key combination to move the focus to the previous field. The combination of Shift+Enter is the same as pressing Enter.

6. If you enter data in a field and press the **Tab** key, but nothing happens, you may need to press the **Enter** key in order for Colleague to accept the field entry. For some fields you need to press the **Tab** key for Colleague to accept the entry and other fields require you to press the **Enter** key.

Detail Buttons

1. Detail buttons, such as the one to the right of the Employment Info field (Figure 49) are used to open background forms. **Click** the **Detail Button** beside **Employment Info**.

![Figure 49](image-url)
2. This will open the EMPL – Employment Summary form along with the Employer LookUp, (S)elf Employed, (U)nknown Employer lookup box (Figure 50). We aren’t concerned with what this background form does, but more with how it behaves. Type a U in the Employer LookUp, (S)elf Employed, (U)nknown Employer box and press the Enter key.

3. This would be a great time to show you how some forms work together. Right now we have three different forms open: NAE, EMPL, and EMPD. You can view any of the open forms by clicking on the form tab at the top of the form window (Figure 51).

4. OK, back to the EMPD form. Here you will see a Comment Field near the bottom right corner (Figure 52).

Comment Fields

1. This, like many other forms have Comments fields with extremely small display boxes. On most of these fields you will see a Detail button beside the field.

2. To enter data in this field you have to open the comment background form. Click the Detail button to the right of the Comments field. When you do the Employment Role Comment form will open (Figure 53). This gives you more space to add your comments.
Date/Time/Logon Stamp

1. The comment we will add is a Timestamp. The Timestamp will insert the current date, current time, and your logon ID to the Comments field. This is normally used to show who updated a record and when.

2. To add a Timestamp, click the **Timestamp** button and the information will be entered in the Comments window (Figure 54).

3. Next, click the **Save** button.

4. If you haven’t made any changes to the form and just need to back-out to your original form you can click the **Cancel** button and go back one form at a time.

5. Since we made changes and clicked Save the **Update record, Cancel record or Return to editing** dialog box opens. Here you must click the **Update** button to update all related forms. Before you click anything else look at the form in the background. Notice the Comments field now has an X in it (Figure 55). That is your indicator that there are comments in that field and if you click the Detail button you can read them.

6. **Click** the **Update** button.

7. You now have two forms open and Colleague has displayed the Employer LookUp box again. We don’t want to add any other Employer data so **click** the **Cancel** button to close this form and return to the EMPL form.

8. You may not have noticed on the way through the first time, but this form was blank. Now you can see the first series of fields (Figure 56) have been populated because we entered information on a background form.
9. Since we changed this form we need to click the **Save** button and then click **Update**. Now we are where we started, at the NAE form, and you see there is now an X in the Employment Info field (figure 57). This indicates that comments were added; if you wanted to see the comments you would drill down with the Detail buttons until you come to comments. And when you finish looking you would back out using the Cancel buttons.

![Figure 57](image)

10. **Click** one last time on the **Save** on the toolbar and then **click** the **Update** button in the **Update record, Cancel record or Return to editing** box. This will save the changes you made to Wilma's record, remove her information from the form, and take you back to the Person LookUp Box. **Click** the **Finish** button in the **Person LookUp** box.

![Figure 58](image)

11. Here's a little shortcut for you. If you need to go back in and work with the same record you just had open, type the at symbol (@) in the Person LookUp box. Try it; **Enter** the @ symbol in the Person LookUp box and then click the **SUBMIT** button.
Favorites

1. Chances are good that you will find yourself using the same forms over and over again. The folks at Datatel figured this would happen so they created the Favorites area where you can store your frequently used forms and people.

2. To begin this part of the lesson you need to open a form. To see which forms you have worked with in the past you can use the Search Field.

3. Click the Drop-Down menu button at the right side of the Search Field and click on the RGPE choice (Figure 59).

4. Now to populate the form, enter the Colleague ID # 1107521 in the Person LookUp box and press the Enter key.

Adding Forms

1. Adding forms to the Favorites area is done by clicking on the Favorites button. The Favorites button is the little gold star located in the top right-hand corner of the Context and Form areas (Figure 60).

2. With the RGPE form open and populated, click the Favorite button in the Form Area (bottom star in Figure 60).

3. This should have opened the Add to Favorites window (Figure 61). The form name will be listed in the Form Name: box and you have the options of adding to the default folder or you can click the New Folder button. We are just going to add it to the Favorites pane so click the Add button

4. Now click the Favorites tab to see your new entry. Open the Biographic Information (BIO) form by double-clicking on it. Before opening the BIO form Colleague will close the RGPE form. Since we didn’t make any changes to the RGPE, form click the Cancel All button and you will see Wilma’s Biographical Information.
Adding Folders and People

1. Adding people to your favorites area is virtually the same as adding forms. The only difference is you click the Favorites button on the Context Card to add that person, or if you have more than one Context Card populated, people, to the Favorites area.

2. For this exercise we will add a new folder in the People area of Favorites and then we will add Wilma to that folder.

3. Click the Favorites button in the Context Area. This takes us to the Add to Favorites window again.

4. Click the New Folder button and type My People in the Folder Name: box (Figure 62) and press the Enter key. Now you can see My People shown in the Add to Folder box. Click the Add button.

5. Click the Favorites tab again and have a look at your new addition (Figure 63).

6. Click the Collapse icon (the little triangle) beside the My People folder and you will see the folder contents moved inside and the folder closes. Click the Expand button (little triangle again) and the folder opens and you can see Wilma’s name again.

7. Click the pane close button and we’ll move on to the next exercise, setting preferences.
Setting Preferences

1. You can personalize your workspace by changing the color theme of your workspace as well as other settings. Click the Options menu selection in the Form window and then click on Preferences from the menu (Figure 64).

2. This will open the Preferences window where you can personalize your workspace. In the Layout area you can choose from 20 different color themes. Click the drop-down button beside Color theme: and you can see some of the different themes you have to choose from.

3. The current theme is Crimson so lets change it. Click on the Jelly Beans option and have a look at the difference. When you first log into Colleague your theme will be set to Default so let's see what that theme looks like. Click the Restore Default Settings button in the bottom left corner of the Preferences window (Figure 65) and you will see the default setting is Ocean View.
4. You can also choose different Form Background Colors from this area by clicking on the radio buttons for Light, Medium, or Dark. We won’t be changing the form background in this course.

5. OK, let’s clean things up a bit before we log out. **Click** the **Cancel All** button to close all forms. This will close all forms we have open without saving any changes we may have made.

6. Now we need to clear the Context Area. **Click** the close (X) button in the upper right corner of the Context Area (Figure 66).

**Logging Out**

Logging out of Colleague is quite simple. **Click** the **Logout** button in the top right corner beside the Favorites tab and the Help (?) button (Figure 67).
Self-Check Competencies

Upon completion of today’s training, I can . . .

❑ define Colleague
❑ define Datatel
❑ define mnemonic
❑ list the three major applications/modules used in Colleague
❑ access Datatel/Colleague using login and password
❑ exit Colleague properly
❑ identify Maintenance forms
❑ identify Inquiry forms
❑ identify Report forms
❑ identify Processing forms
❑ save information entered into a screen
❑ cancel entries made in a screen
❑ add a record
❑ edit a field entry
❑ delete a field entry

❑ access help options
❑ Timestamp an entry in a Comment field
❑ navigate between fields
❑ make a selection from a lookup screen
❑ use shortcut to retrieve last record
❑ **Enter** information into the following field types
  o Free entry
  o Drop down
  o Lookup
  o Calculated
  o Date
  o Detail
  o Multivalue
  o Comment