

Colleague UIWeb 4.3- Basic 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 WSU 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/Colleague **UIWeb 4.3** icon on your Desktop.

The icon looks like a round blue ball.

2. When the "Welcome" screen displays, click the **Begin** button.

The Datatel/Colleague Login screen displays.



3. In the UserID box, type the **Colleague UserID** provided to you by Information Technologies.
4. In the **Password box**, type your Colleague password (case sensitive). Then, click the **Login** button or press the **<Enter>** key.

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

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Logging into Colleague (Continued)

Colleague User Interface 4.3 opens displaying the “Quick Tour” screen.

5. Watch the tutorial by clicking the forward pointing arrow in the center of the screen, if desired. Then, click **inside** the **Don't Show Me Again** checkbox in order to hide the screen from displaying in the future.

Note: Information Technologies strongly recommends new users watch the “Quick Tour Video” that is available anytime from the Help menu.

In addition, please refer to the [Newest Changes](#) document to learn about some recent feature enhancements to UIWeb 4.3.

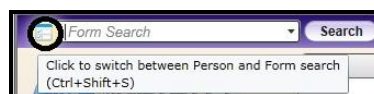
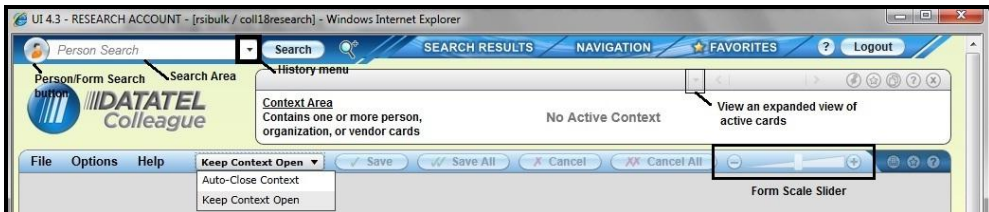


Once the Quick Tour screen is closed, the UIWeb 4.3 Search and Context areas are visible at the top of the window.

Note: For those already familiar with UIWeb, the method in which cards and forms are chosen has changed since the introduction of UIWeb. In UIWeb 4.3, click the Person / Form Search button (Ctrl+Shift+S) to toggle between the two choices. Then, type search criteria in the Search box and click the Search button or Press <Enter>.

The drop-down menu provides a history list of people/forms previously entered.

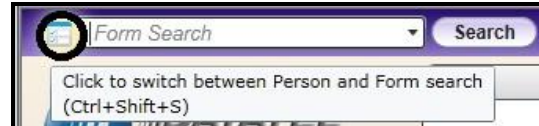
A “Person search” indicates a search for a person, organization, or vendor will be performed.
A “Form search” indicates a search for a particular form (e.g. STSC) will be performed.



Colleague UIWeb 4.3 - Basic Features

Data regarding students, staff, and faculty gets entered into our Colleague database when students apply for entrance to Worcester State University, register for classes, work or teach at the University, 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, organization, vendor, or a form. Once search criterion is entered, all persons or forms matching the criterion display. Opened forms display data (e.g. name, address, and phone number) for the active person card 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 (magnifying glass) 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 area. The Navigation tab provides a means of visually locating desired forms (e.g. STAL). 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 circular **Person/Form** button until the **Person Search** button displays.
2. Type a Person's **Name** (At least 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.

If available, WSU ID Photos appear to the left of the person's name.

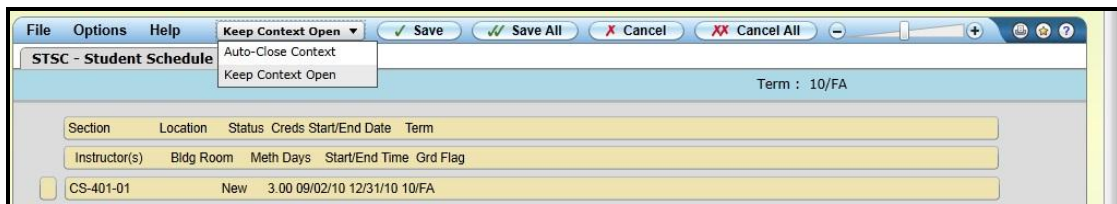


3. **Select** desired cards by **clicking inside the Select All box or white boxes to the left of each desired Person's ID #**. Then, click **Open** at the bottom of the screen or Press <Enter>. Selected cards open and become active in the Context area by clicking the Previous (<) or Next (>) arrows.

Colleague UIWeb 4.3 - Basic Features

Some nice new form features are available in this version of UIWeb.

- The Context area automatically can be closed when a form is finished.
- The scale size can be adjusted for easier viewing.
- A copy of the form or report can be printed directly to a defined local printer.
- Reports can be exported as PDF files in the Report Browser.
- When the cursor is within a table, data can be exported to an Excel .csv file (providing appropriate permissions have been authorized).
- Recently created shared lists can be viewed from the Advanced Search and Create Shared List windows.
- Forms that function differently in separate applications (e.g. Val form) are easier to open.
- Active people or forms can be added to “Favorites” when in the Favorites panel.



The Search Area – Opening a Person Card and Form

4. In order to open a Form such as STSC - Student Schedule, click the **Person/Form button** until a picture of a **Form** displays on the face of the button. Then, in the **form search area**, type the **mnemonic** (e.g. **STSC**) representing the form that is desired. Click **Search** or Press <Enter>.to finalize the selection.

It **also is possible to type a key word** for the form (i.e. schedule or student schedule) to obtain a list of forms matching the typed words.

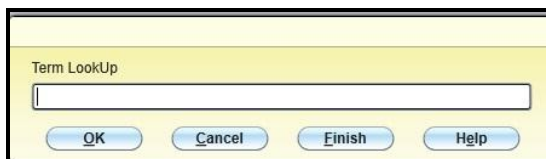
NOTE: If the desired form doesn't open when the mnemonic or typed text is entered into the Search box, check to see if the desired system has been selected from the Application menu. Click the Navigation tab to bring it in front of other tabs. Then, check to see which application is selected. ST represents the Student system, CF represents the Financial system, UT represents the Root, and HR represents the Human Resources system

If the desired application isn't selected, choose it from the drop-down Application menu.

In addition, letters representing the Colleague application in which the form resides followed by a dash and the form mnemonic can be typed into the Search box (e.g. ST-STSC, or CF-XPUA). Then, click the Search button.

You can use the Navigation tab 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.



Colleague UIWeb 4.3 - Basic Features

The Search Area – Opening a Person Card and 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** (e.g. 11/FA). Then, click **OK** or Press <Enter> to view form information for the person whose card is open.

FA Fall Semester	IN – Intersession	S1 – Summer 1
SP - Spring Semester		S2 – 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 **OK** or Press <Enter>.

Click <Finish> if you want to close the form and return to the main UIWeb screen.

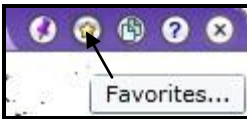
Colleague UIWeb 4.3 - Basic Features

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 to Favorites by clicking the Add to Favorites gold star button in the Context area.

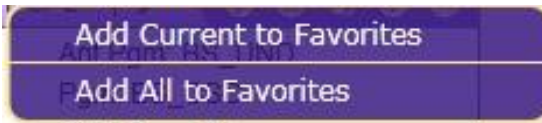
If desired, a new folder in which to organize and store groups of cards can be created and labeled.

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.

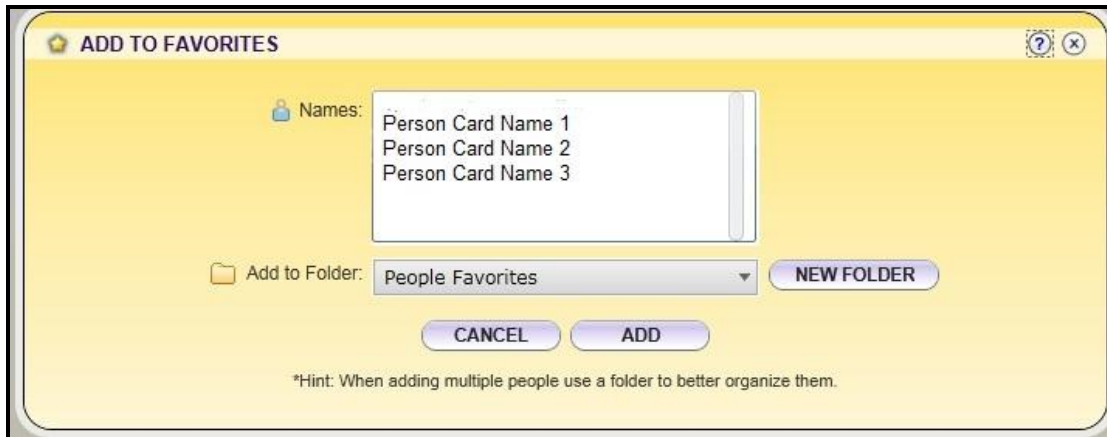


The Add Current to Favorites and Add All to Favorites options display.



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.



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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.

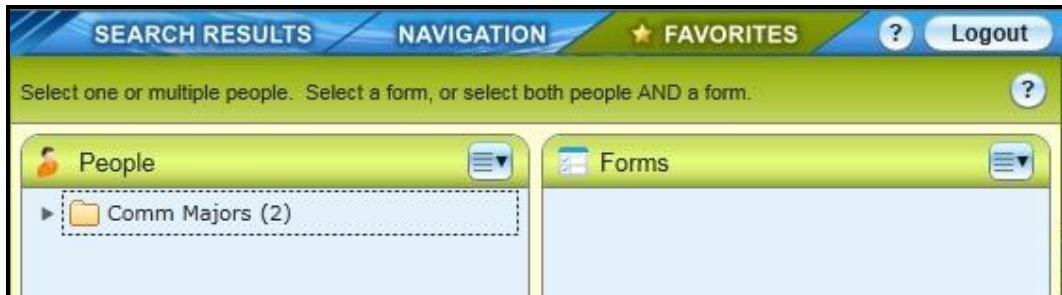


The Search Area – Access and Use Saved People Cards

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 Card, data for the person whose card is open should populate the form.

Colleague UIWeb 4.3 - Basic Features

Saving, Cancelling, and Deleting Form Changes

Open forms display in the Colleague User Interface Form Area.

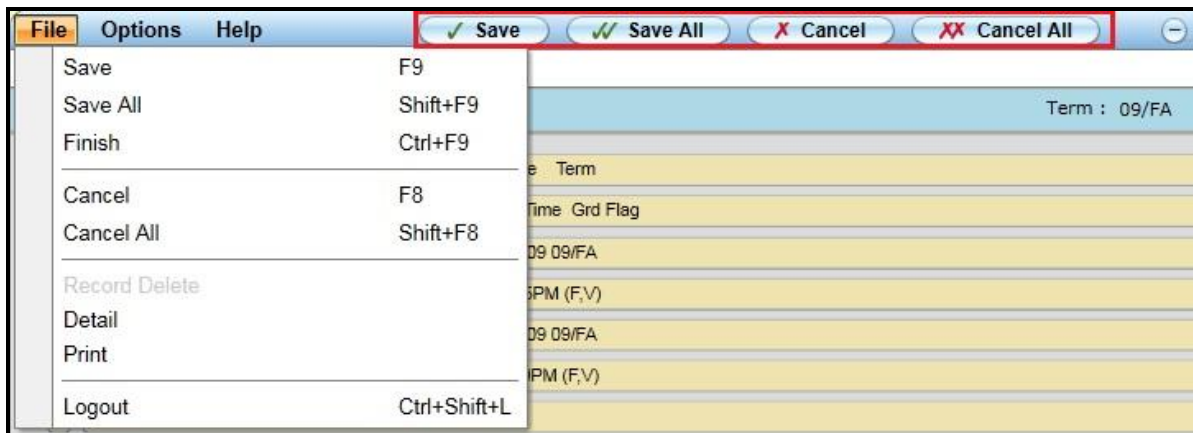
Save ALL, Cancel ALL, and selections from the File menu, allow applicable changes to be saved or cancelled.

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 (Person card) 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.



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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.

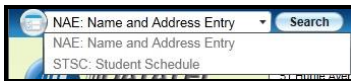
Window Operation Buttons  enable a row to be added or deleted.

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. CHECK THIS IN NEW VERSION

Using the UI Form Area

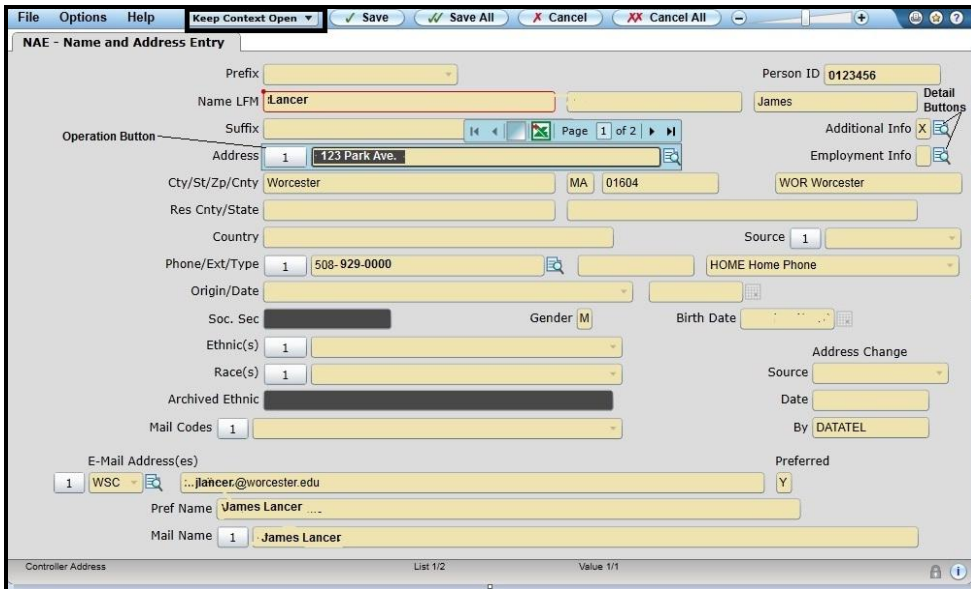
1. With open People Cards displaying in the Context area, open a **Form** to which you have been assigned **Edit** permissions.

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.

Notice the Keep Context Open drop-down menu offers an Auto-Close Context option.



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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.

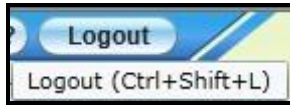


5. Click **Finish** to close all forms and return to the Opening Colleague UI 4.0 window.

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Logout of Colleague

6. If you are finished using Colleague, make certain to **Logout** using the Logout button on the far right-hand side of the window or by pressing the <Ctrl + Shift + L> keys.



7. Close the browser window.