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About this Course
The purpose of this course is to introduce you to the exciting new features and functionality of User Interface 4. These course materials reflect the features and functionality present in UI 4.3. In this course, the instructor will provide an overview of each feature and walk participants through a hands-on activity using that feature.

Your Workbook
Your workbook should be used to review key points, record notes and complete class activities. It will serve as a useful reference to supplement the information listed in the UI 4 online help.

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The Colleague form is resizable and can be manipulated with a slider bar.
Menu Bar
The menu bar has been simplified and offers the following menus under each option.

File Menu

<table>
<thead>
<tr>
<th>Menu</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>F9</td>
</tr>
<tr>
<td>Save All</td>
<td>Shift+F9</td>
</tr>
<tr>
<td>Finish</td>
<td>Ctrl+F9</td>
</tr>
<tr>
<td>Cancel</td>
<td>F8</td>
</tr>
<tr>
<td>Cancel All</td>
<td>Shift+F8</td>
</tr>
<tr>
<td>Record Delete</td>
<td></td>
</tr>
<tr>
<td>Detail</td>
<td></td>
</tr>
<tr>
<td>Add Active Form to Favorites</td>
<td>Ctrl+Alt+P</td>
</tr>
<tr>
<td>Print Form</td>
<td>Ctrl+Alt+P</td>
</tr>
<tr>
<td>Logout</td>
<td>Ctrl+Alt+L</td>
</tr>
</tbody>
</table>

Options Menu

Clear Search History

Clear History Menu

When you choose Person or Form Search History, you can choose the items to delete.
Reload Colleague Session

- Preferences (Ctrl+Alt+F)
- Clear Search History... (Ctrl+Shift+H)
- Reload Colleague Session
- Change Password
- Show Field Sequence
- Disable Custom Field Sequence
- Customize Field Properties
- Set Form Scale Default
- Clear All Form Scale Values

Help Menu

- Process Help
- Field Help (Ctrl+Alt+H)
- List Keyboard Shortcuts (Ctrl+Alt+K)
- Quick Tour
- About

- Datatel Documentation
- Datatel Users' Community Forums
- Datatel Support Resources
- Datatel Client Communities
- Datatel Users' Group (DUG)

Allows you to reload form without logging out of the session.
Search for Person

Person Search also performs **Organization** search

Rather than selecting a Colleague form first, and then selecting the person or organization, the user interface allows you to select the person(s) or organization(s) first, and then choose the Colleague form. The Search Area is used to:

- Choose the type of search to perform (Person/Organization or Form). The type is indicated by a watermark in the search text box.
- Enter the search criteria (name, partial name, SSN, Colleague ID, etc.)
- Access the **Advanced Person Search** feature.

**Procedures for Person Search**

1. In the Search Area, select the **Person Search Icon**.
2. Enter your person search criteria, such as the person's name or Colleague ID, in the search text box.
3. Click **Search** or press the {Enter} key.

**Procedures for Advanced Person Search**

1. In the Search Area, click the Advanced Search icon.
2. In the Advanced Person Search dialog box, enter your search criteria.
3. Click **Submit**.
Search Results Panel

Search results from any search made in Colleague are displayed on the **Search Results Panel**. Each record is identified with a sequence number that may be selected using the **Select #** field at the bottom of the panel. Results may span multiple pages. To move through pages, use the navigation icons located in the upper right and lower right corners of the panel.

**Views**

**Card View**

The [Search Criteria] icon is used to ____________________________________________________

You may hide the Search Results Panel. Two ways of doing this are:

1. ______________________________________________________________________________
2. ______________________________________________________________________________

The [Add a Person] icon is used to ____________________________________________________

The [Open Selected Records] icon is used to ____________________________________________

The [Export to Microsoft Excel] icon is used to __________________________________________

The [Card View or Grid View] icon is used to ____________________________________________

The [Number of results. Navigate through results pages.] icon is used to __________________

The [Search Results Panel Help] icon is used to __________________________________________
**Grid View**

- Selected Records are Highlighted
- Click on Column Headers to Sort
- Photos are not displayed.

### Card View vs. Grid View

Search results may be displayed in Card View or Grid View.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Card View</th>
<th>Grid View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photos</td>
<td>Displays photos of people (if available)</td>
<td>Does not display photos</td>
</tr>
<tr>
<td>Selecting multiple records</td>
<td>Click each record</td>
<td>Use CTRL- or SHIFT- while clicking each record</td>
</tr>
<tr>
<td>Number of records displayed per page</td>
<td>Smaller number</td>
<td>Larger number</td>
</tr>
<tr>
<td>Sorting records</td>
<td>Not sortable</td>
<td>Sort by clicking on column headers</td>
</tr>
<tr>
<td>Default Display by Number of Columns</td>
<td>Results with more than 3 columns will be displayed</td>
<td>Results with 3 or less columns will be displayed</td>
</tr>
</tbody>
</table>

---

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The Context Area

The Context Area displays information about the person or organization you are currently working with. Each person/organization is represented by a "card". The Context Area can hold multiple person cards or organization cards at a time. Only one type (person or organization) of card can be held in a group at one time. When multiple cards are loaded, you may scroll through the stack of cards using the Card Scroller, or use the card selector drop-down to access a specific card.

The Card Selector displays all of the available cards in the stack in a Results panel. You can select which cards you would like to work with and perform basic functions such as Open, Remove, Map and Add to Favorites directly from the Results Panel.
The Context Area also contains the following buttons:
Mapping

Address

Mapping button

Best View

Location Pushpin

Notes
ACTIVITY: Search for Person

In this activity, you will perform a basic person search and explore the use of the Search Results Panel.

1. In the Search Area, click the Person Search icon.

2. Enter a common last name such as Smith, Johnson, or Anderson, then click Search or hit the [Enter] key.

3. Verify that the Search Results Panel displays several records. If it does not, repeat the search using a different name until several records are found.

4. Explore the various features of the Search Results Panel and answer the following questions.
   a. List at least three ways to select records on the Search Results Panel. (Hint: Don't forget to try both Card View and Grid View)

   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

   b. Hide the Search Results Panel using the icon, then unhide it by clicking the Search Results tab at the top of the Colleague UI Window. What happens to your search results?

      ____________________________________________________________

5. In the Search Area, enter another common last name, then click Search or press the ENTER key.

Continued on next page
6. Select a few records. Do NOT select all of the records.

7. Click **Open** to open the selected records. Verify that the records appear in the Context Area.

8. Explore the Advanced Person Search functionality. What is displayed in the **Search Results For** heading at the top of the Search Results from?

_________________________________________________________________
_________________________________________________________________

**Notes**
**ACTIVITY: Context Area**

In this activity, you will explore various features of the Context Area. You should already have several person cards in your Context Area from the previous activity. If you do not, perform a Person search based on a common last name and open at least 4 records.

1. Use the Card Scroller and Card Selector to access different cards in the Context Area.
   a. Advance through the stack of cards using the Card Scroller.
   b. Use the Card Selector to see the Results Panel and directly access a record.
   c. Which record is the Active Card?

2. Use the Search Results Panel to add more cards.
   a. Click the Search Results tab to display the Search Results Panel.
   b. Select and open 2 more records. What happens in the Context Area?

3. Perform a new person search and add records to the Context Area.
   a. Perform a Person search using a different name and open a few records from the Search Results Panel.
   b. Advance through the stack of cards using the Card Scroller, noting the order of the records. How have the new cards been sequenced?
   c. Click on the Card Selector, noting the order in which the records are listed. How have the new cards been sequenced?
ACTIVITY: Mapping

In this activity, you will find out more about the mapping feature. You should already have several person cards in your Context Area from the previous activity. If you do not, perform a Person search based on a common last name and open at least 4 records.

1. Use the Mapping feature to display addresses on a map.
   a. In the Context Area, locate a Person card with a valid address.
   b. Click the Mapping button and click Map It.
   c. If the map does not appear to be scaled correctly, click 
   d. Locate the purple pushpin on the map, then hover your mouse cursor over it. What do you see?
   ____________________________________________________________
   e. Close the map by clicking the Close icon 
   f. Repeat steps a-d, but instead of choosing Map It, choose Map All. What is the difference between the two choices?
   ____________________________________________________________

4. Close the cards in the Context Area.
   a. Click the Close icon , then select Close Current to close the record currently displayed in the Context Area.
   b. Click the Close icon , then select Close All to close all records in the Context Area.
Search for Form

Choose the Form Search icon.

Enter a Mnemonic or Title word.

Click Search or press the {Enter} key

You can search for and execute a Colleague form by mnemonic or by description. Any forms that match the search criteria will be displayed on the Search Results Panel. If a mnemonic is entered, the form will immediately launch in the UI Form Area.

**Option 1:** Execute a form with an appropriate record opened in the Context Area


**Option 2:** Execute a form **without** an appropriate record opened in the Context Area


The Navigation Panel may be used to select a Colleague form using the Colleague application menu structure.
Colleague User Interface 4 includes icons for **Print Form**, **Add to Favorites** and **Form (Process) Help**.
Form Scaling
You can scale an individual form or all forms to an appropriate size by using the Slider Bar.

Procedures for Scaling Forms
1. Choose the appropriate scale by using the scaling slider bar on the form you are working on.
2. Determine at what level you want the scaling to occur.

<table>
<thead>
<tr>
<th>If you want to set the scale</th>
<th>Then</th>
</tr>
</thead>
</table>
| For this form only           | • Save out of the form  
|                              | • Return to the form to verify the changes took place. |
| For ALL forms                | • Select **Options**  
|                              | • Select **Set Form Scale Default**.  
|                              | • Log out of Colleague and log back in to verify the changes took place. |

**Note:** To clear scaling defaults, Select **Options>Clear All Form Scale Defaults**

Auto-Close Context or Keep Context Open
When finishing (saving or cancelling) a form, you can have the record automatically close in the Context Area by selecting **Auto-Close Context**. Otherwise, select **Keep Context Open** to have the record remain in the Context Area.
Executing Colleague forms with or without a card in context.

The initial behavior of a Colleague form will depend upon whether an appropriate card is currently in the Context Area.

1. If there is no card in the Context Area, then the form will:

_____________________________________________________________
_____________________________________________________________

2. If there is a card in the Context Area, and the Colleague form will accept the card as its primary/initial LookUp, then the form will:

_____________________________________________________________
_____________________________________________________________

3. If there is a card in the Context Area, and the Colleague form will not accept the card as its primary/initial LookUp, then the form will:

_____________________________________________________________
_____________________________________________________________

Notes
Additional Form Features

Comments
When adding comments to a form, you can add the comments in a dialogue box that provides a timestamp for individual comments. You can also find comments by using the Find Next button.

Window Groups
When there are window groups (fields arranged in columns and rows on a form), attached to fields, they are now highlighted and shown with a navigation bar.
Print Form
You can now print a Colleague form to a local or network printer.

Bar Graph
When a process is running in Colleague, you can now view a bar graph of its progress and choose when it should close.
Exporting a Report to a PDF File

When viewing a report in the Report Browser, you have the option to export the report as a PDF file. This will export the entire report (regardless of length). This feature can be used to print long reports, since the Print Remote feature is limited in the number of pages that can be printed.

Export PDF
ACTIVITY: Colleague Forms

In this activity, you will explore the way in which Colleague forms are executed using Search and the Navigation Panel, and how forms are used with and without cards in the Context Area.

Before you begin:
If you do not already have multiple Person cards in the Context Area, perform a Person search on a common last name and open several records.

1. Open a Colleague form with Person cards in the Context Area, then advance through multiple Person records:
   a. In the Search Area, click the Form Search icon.
   b. In the search text box, enter the word name and click Search to search for all Colleague forms with "name" in the title.
   c. In the Search Results Panel, select and open the Formatted Names (FNM) form.
   d. In the Context Area, use the Card Selector and/or Card Scroller to advance to other people. What happens each time you select a different person?
      __________________________________________
   e. In the Context Area, click the Close icon, then select Close Current. What happens?
      __________________________________________
   f. In the Context Area, click the Close icon, then select Close All. What happens to the Colleague form?
      __________________________________________

Continued on next page
2. Open a "non-Person based" Colleague form with a Person card in the Context Area:
   a. Search for and open at least one Person record in the Context Area.
   b. In the Search Area, click **Form**.
   c. In the search text box, enter the mnemonic **LOCN**, then click **Search** to search for and launch the **Locations** form.
   d. What happens when the Locations form appears? Is this what you expected?

3. Open a Colleague form with no cards in the Context Area:
   a. In the Context Area, click the **Close** icon ✗, then select **Close All**.
   b. Using the **Navigation Panel**, launch the following Colleague form:
      ST application > Curriculum Management > Courses > **Course Details**
   c. What happens when the Course Details form appears?
ACTIVITY: Additional Form Features

In this activity, you will adjust the scale of the Colleague form and print a form.

Before you begin:
If you do not already have a Person card in the Context Area, perform a Person search on a common last name and open a person record.

1. Open a Colleague form with a Person card in the Context Area.

2. Set the default scale for your instance of Colleague.
   Make sure you log out of Colleague and back in to verify the scaling took effect.

3. Change the scale of the same form and set scale of an individual form
   a. Save out of the form and look at that form and another form. Did it work?

4. Clear scaling

5. Print the Active Form.
Favorites

Colleague User Interface 4 allows you to define People Favorites as well as Form Favorites. People Favorites and form Favorites are displayed in separate areas within the Favorites Panel.

Adding People Favorites

Adding Form Favorites

Notes
Adding to Favorites Dialog Box

When adding Favorites, you will use the **Add to Favorites** dialog box to add your new Favorites into existing folders, or you may create new folders in which to add them. You may create nested Folder structures.

**Notes**
The Favorites Panel is used to select and manage existing Favorites. It is divided into two areas; **People Favorites**, and **Form Favorites**. Each area has a drop-down menu that contains the following options:

- **Collapse All**
- **Expand All**
- **Remove Selected**
- **Rename**

Additionally, the People Favorites contains this option:

- **Create Shared List**
ACTIVITY: Favorites

In this activity, you will add People Favorites and Form Favorites and use them to load multiple people and a form simultaneously. You will also create a Shared List of people.

1. Add people from the Context Area to a new folder in People Favorites.
   a. Perform a Person search (or multiple Person searches), and open several Person records into the Context Area.
   b. In the Context Area, click the Add to Favorites button 📌, then choose Add All to Favorites.
   c. In the Add to Favorites dialog box, click New Folder.
   d. In the Create New Folder dialog box, verify that the Create In folder is specified as "People Favorites", then enter your name as the Folder Name that will be created.
   e. Click Create and Add when prompted.

2. Add a Colleague form to a new folder in Form Favorites.
   a. Using Form search, launch the Emergency Information (EMER) form to display emergency information for the person currently displayed in the Context Area.
   b. In the UI Form Area, click the Add to Favorites button 📌.
   c. In the Add to Favorites dialog box, click New Folder.
   d. In the Create New Folder dialog box, verify that the Create In folder is specified as "Form Favorites" and enter your name as the Folder Name that will be created.
   e. Click Create and Add when prompted.
   f. Click Cancel All to exit the Emergency Information form.
   g. In the Context Area, click the Close button 📌, then choose Close All.

Continued on next page
3. Recall your People favorites and Form favorite using the Favorites Panel.
   a. Click the **Favorites** tab to display the Favorites Panel.
   b. In the People area, expand your folder to display your People Favorites.
   c. Select a few people by holding down **SHIFT** or **CTRL** as you click each person.
   d. In the Forms area, expand your folder to display your Form Favorites.
   e. Click the **Emergency Information (EMER)** form to select it.
   f. Click **Open**. What happens?

4. Create a Shared List from your People Favorites.
   a. If you have a Colleague form open, click **Cancel All** to close it.
   b. Click the **Favorites** tab to display the Favorites Panel.
   c. In the People section, expand your folder to display your People Favorites.
   d. Select a few people by holding down **SHIFT** or **CTRL** as you click each person.
   e. Click the **icon in the People section and choose Create Shared List**.
   f. In the **Create Shared List** dialog box, enter a meaningful name after the default prefix that appears in the **Shared List Name** field. Write your Shared List Name here:

   ________________________________

   g. Click **Create**.
   h. Hide the Favorites Panel.

   *Continued on next page*
5. Search for People in your new Shared List.

   a. If there are cards displayed in the Context Area, close them all.

   b. In the Search Area, click the **Advanced Search** icon.

   c. In the **Shared List Name** field, enter the name of your new Shared List.

   d. Click **Search**. What happens?  

       ___________________________________________________________

       ___________________________________________________________

   e. Hide the Search Results Panel.

_Notes_
Preferences

The Colleague User Interface preferences can be accessed using the drop-down menu in the upper right corner of the Colleague UI Window.